Course ID: MSS 204
Course: Manager Self Service – Time Management - Timekeeper

Ground Rules

Be on time

Turn off your cell phones when in class

Participate actively in class; refrain from email and internet use

Attendance

Take breaks as needed

Feel free to ask questions

Course Overview

Course Description	This course provides a comprehensive review of the Time Management processes.
	
	This course consists of the following modules:
	• Module 1: Course Introduction
	• Module 2: Time Management
	  ○ Enter Time on Behalf of Employee
	  ○ Submit Absence on Behalf of Employee
	  ○ Manage Work Schedules
	• Module 3: Course Summary

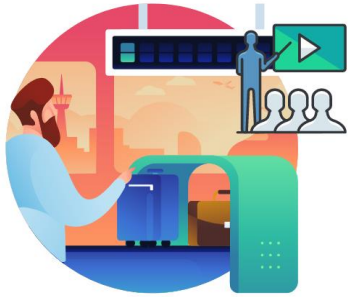
Training Audiences	• Timekeepers
Prerequisites	• ERP 101 - Overview of ERP • ERP 102 - INFORMS Navigation and Online Help
Other Related Courses	• N/A
Estimated Duration	• 3 Hours

Module 1: Course Introduction

Module Topics
Course Administration and Logistics
Learning Objectives
Roles and Responsibilities
Navigation
Purpose and Benefits of the Business Process
The End-to-End Business Process
Introduction to Demonstrations and Exercises

Course Administration and Logistics

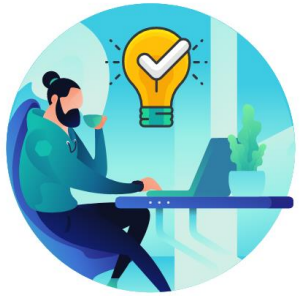
To receive credit for completing this course, Users must record your attendance at the beginning, and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class

Actively participate in class

Take Breaks at scheduled times



Ask questions; this is your time to learn

Be back from Breaks on time

Learning Objectives

- Enter Time on Behalf of Employee
- Submit Absence on Behalf of Employee
- Manage Work Schedules

Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

Role	Responsibilities
Timekeeper	The Timekeeper is responsible for keeping time and attendance at the department level, ensure completeness and accuracy of time.

Navigation

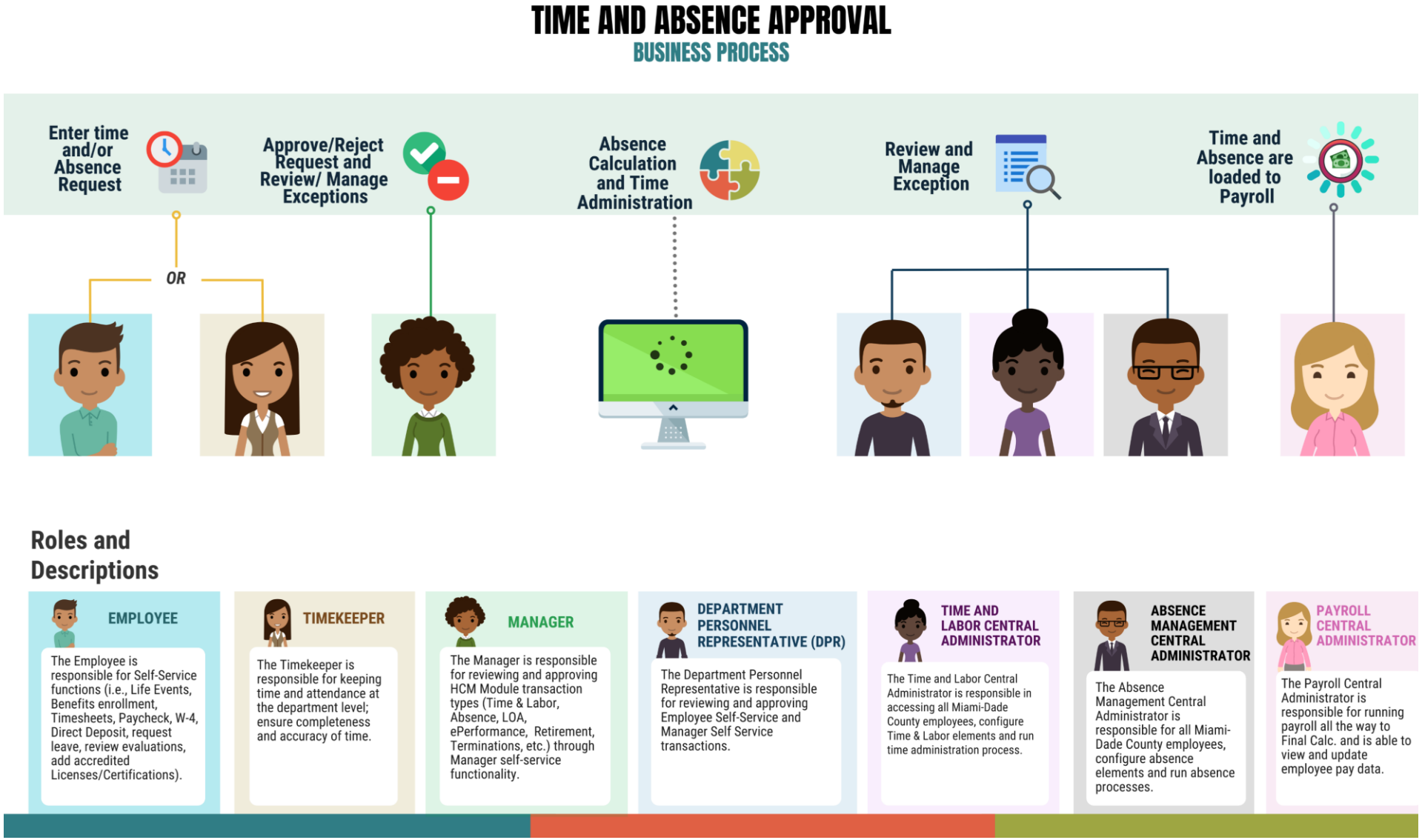
Navigation via NavBar: **Human Resources (HCM)**

Purpose and Benefits to Business Process

The purpose and benefits of the Time Management business process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Enhanced Reporting
- Consolidated Benefit Billing System – Leave of Absence (LOA), retirees, and benefit billing all in one system

End-to-End Business Process

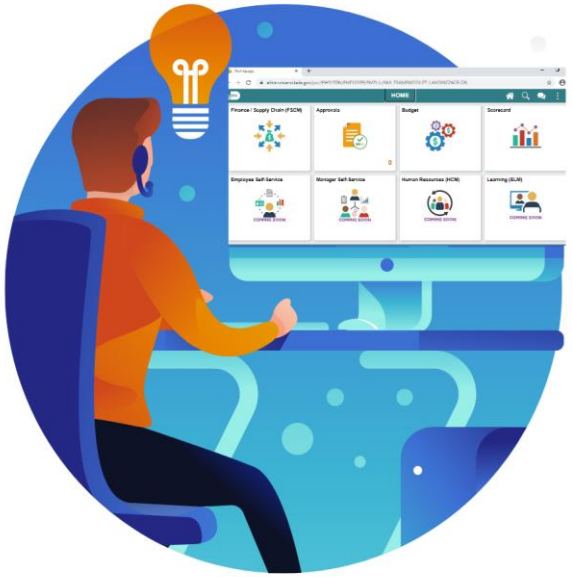


Introduction to Activities and Exercises

- You will take part in two types of hands-on learning throughout this course.

Instructor Demo

Training Activities



Training Exercises

Module 1: Course Introduction Summary

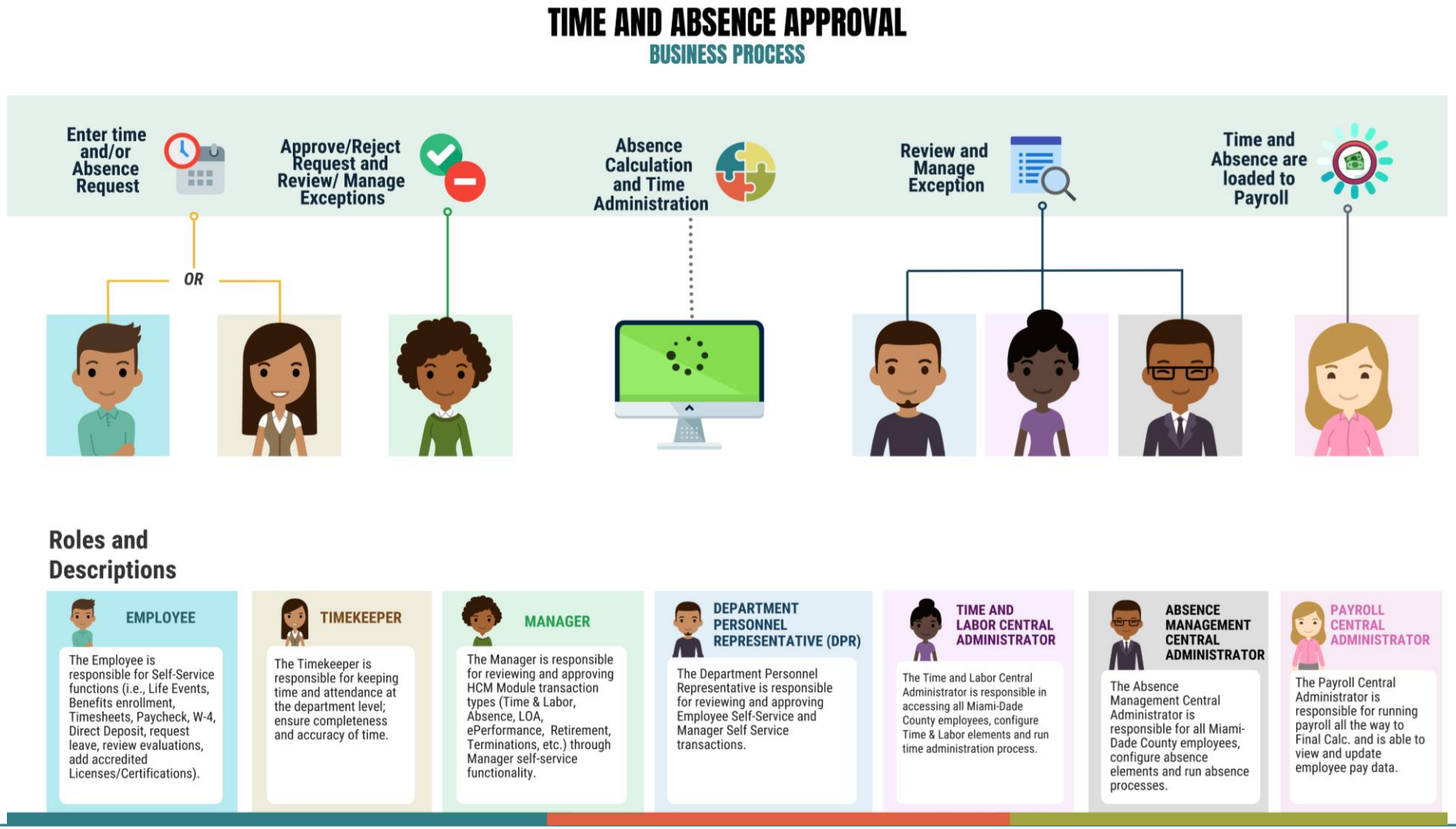
Module Topics
Course Administration and Logistics
Learning Objectives
Roles and Responsibilities
Purpose and Benefits of the Business Process
Navigation
The End-to-End Business Process
Introduction to Demonstrations and Exercises

Lesson 1: Enter Time on Behalf of Employee

At the conclusion of this lesson, you will be able to:

- Acknowledge the difference between reported and payable time
- Enter time on behalf of an employee using an elapsed timesheet

Lesson 1: Enter Time on Behalf of Employee Continued



Lesson 1: Key Terms

Term	Definition
Reported Time	Time as it is entered on the timesheet. This is what Managers will approve.
Payable Time	Time after it has been processed and rules applied to create differentials, supplements, and overtime.

Lesson 1: Enter Time on Behalf of Employee Continued

Timekeeping during the Current Period

The following topics will be discussed in this course:

- Timekeeping during the Current Period
- Entering Time on Behalf of an Employee
- Entering an Absence on Behalf of an Employee using Absence Management

Lesson 1: Enter Time on Behalf of Employee Continued

Timekeeping during the Current Period

Reported versus Payable Time

- The time submitted by the employee is known as *reported time*
- The reported time is processed through Time Administration, it generates *payable time*
- If the employee's Manager is unable to review and approve the time, their second level Manager can approve this request
- If a manager cannot approve by the deadline, the Department Personnel Representative (DPR) can approve on the Manager's behalf
- Once *reported time* is approved by either the Manager or DPR, the Time Administration process will produce *payable time* which is sent to Payroll

Lesson 1: Enter Time on Behalf of Employee Continued

Timekeeping during the Current Period

Payable time represents:

- The quantity of work performed, in hours or dollars
- The time reporting code that controls how the employee is paid
- The tasks to which time was reported by the employee

Lesson 1: Enter Time on Behalf of Employee Continued

Timekeeping during the Current Period

Online Time Entry Users

- All employees who report time in the Miami-Dade County INFORMS Time and Labor module use the same pages to report work hours and tasks
- These time reporting pages are the same pages that the employee's supervisor and the Department Personnel Representative (DPR)s view to approve time, too

Lesson 1: Enter Time on Behalf of Employee Continued

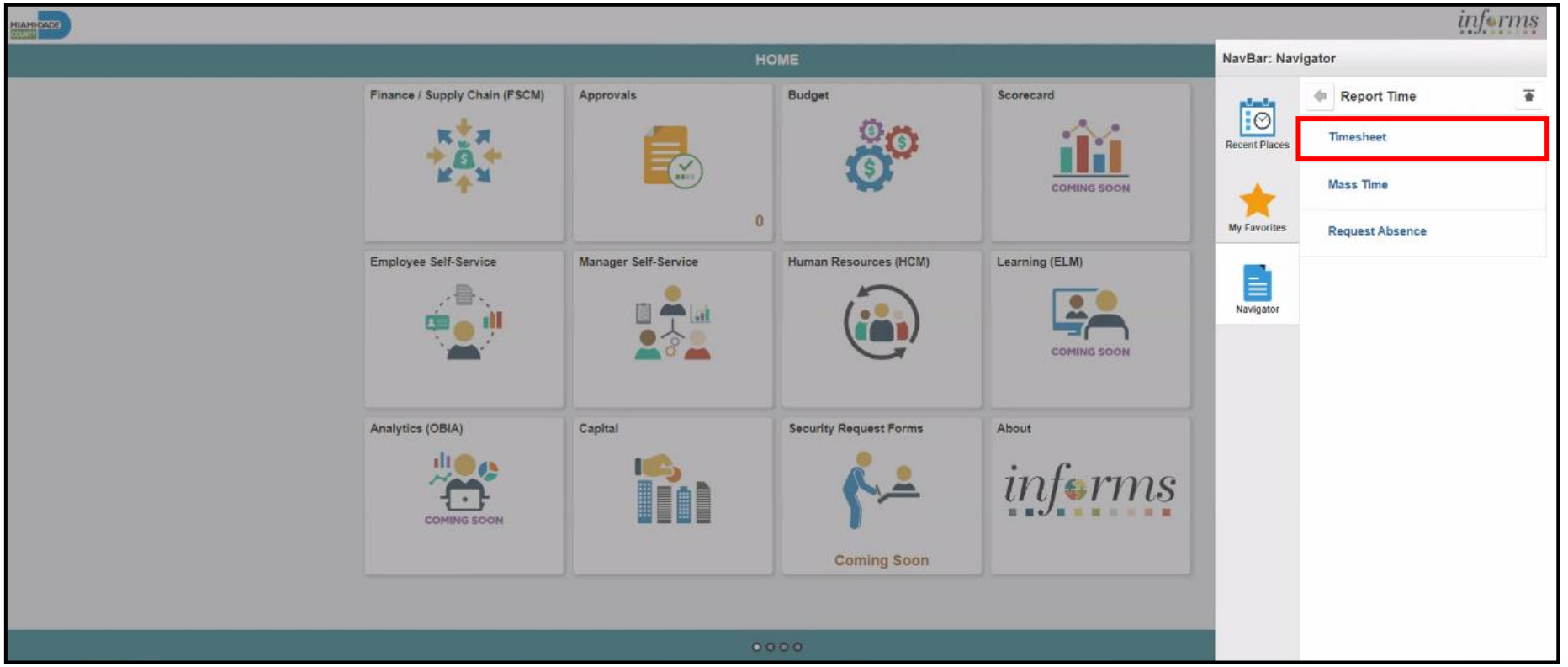
Timekeeping during the Current Period

Key Impacts

- In INFORMS, there is a single page that is used for both payment and task distribution
- The time and task reporting are done on the same line in the timesheet
- Additional lines can be added for additional task reporting details or for more than two iterations

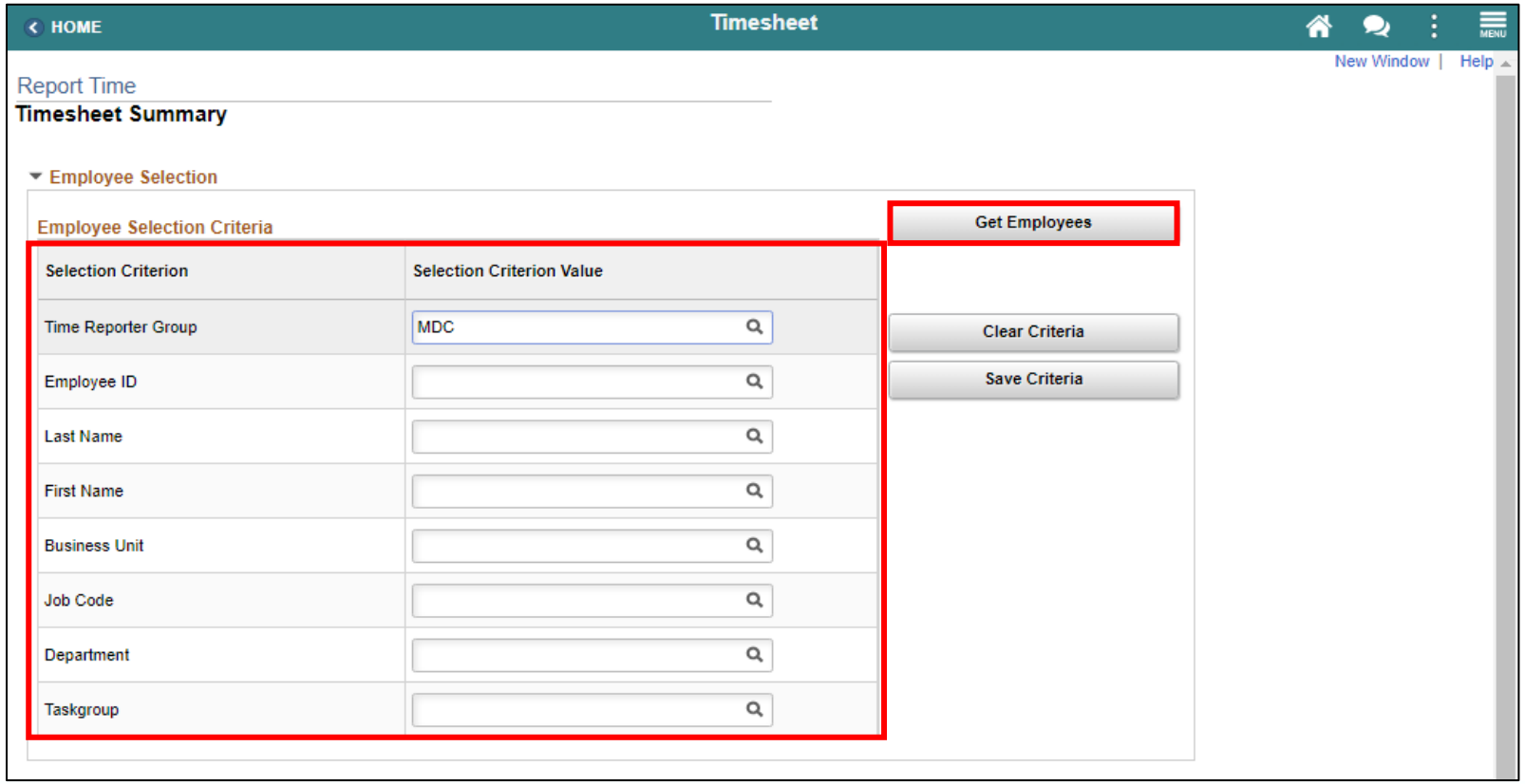
Lesson 1: Enter Time on Behalf of Employee Continued

1. Navigate **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



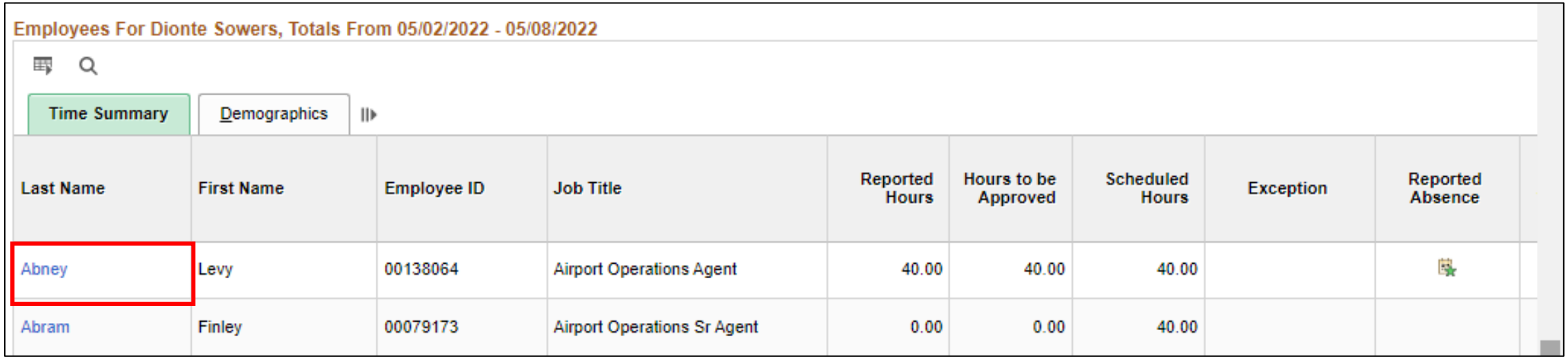
Lesson 1: Enter Time on Behalf of Employee Continued

2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 1: Enter Time on Behalf of Employee Continued

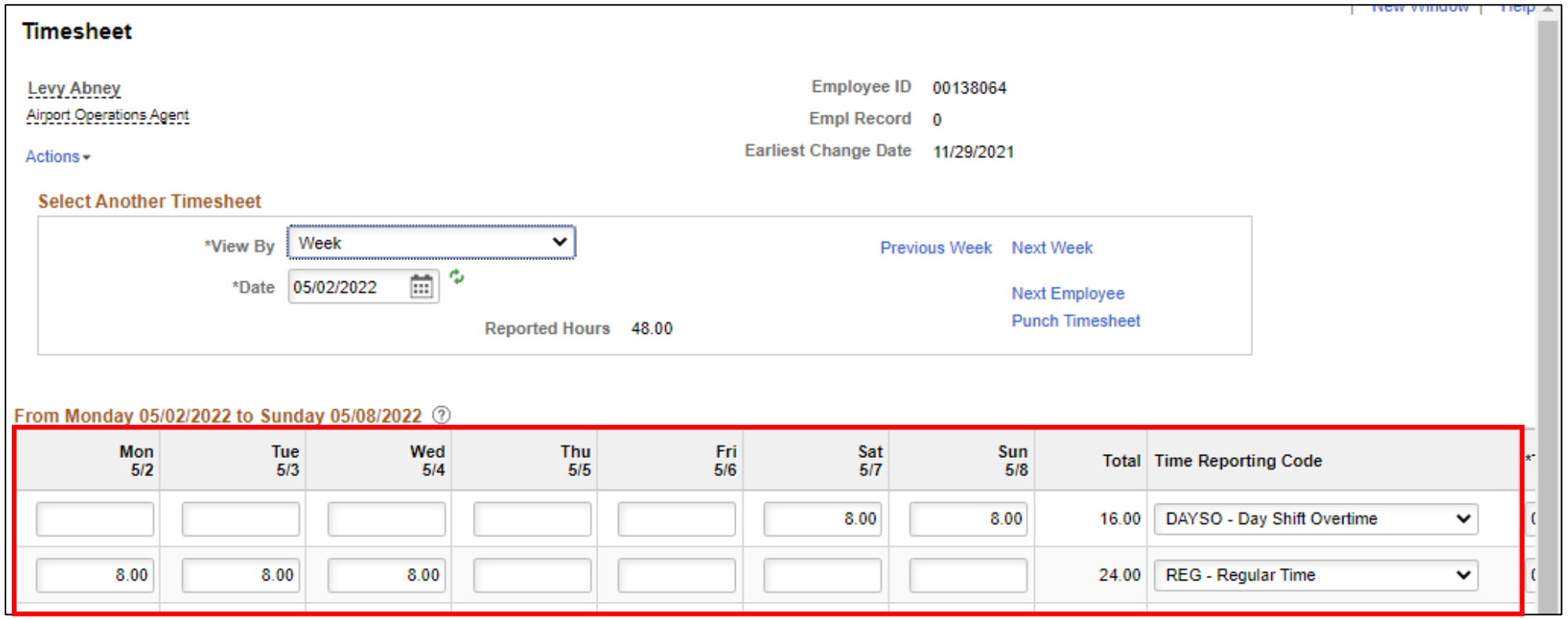
3. Select an employee's **Last Name** to display the details of the submitted reported time.



Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence
Abney	Levy	00138064	Airport Operations Agent	40.00	40.00	40.00		
Abram	Finley	00079173	Airport Operations Sr Agent	0.00	0.00	40.00		

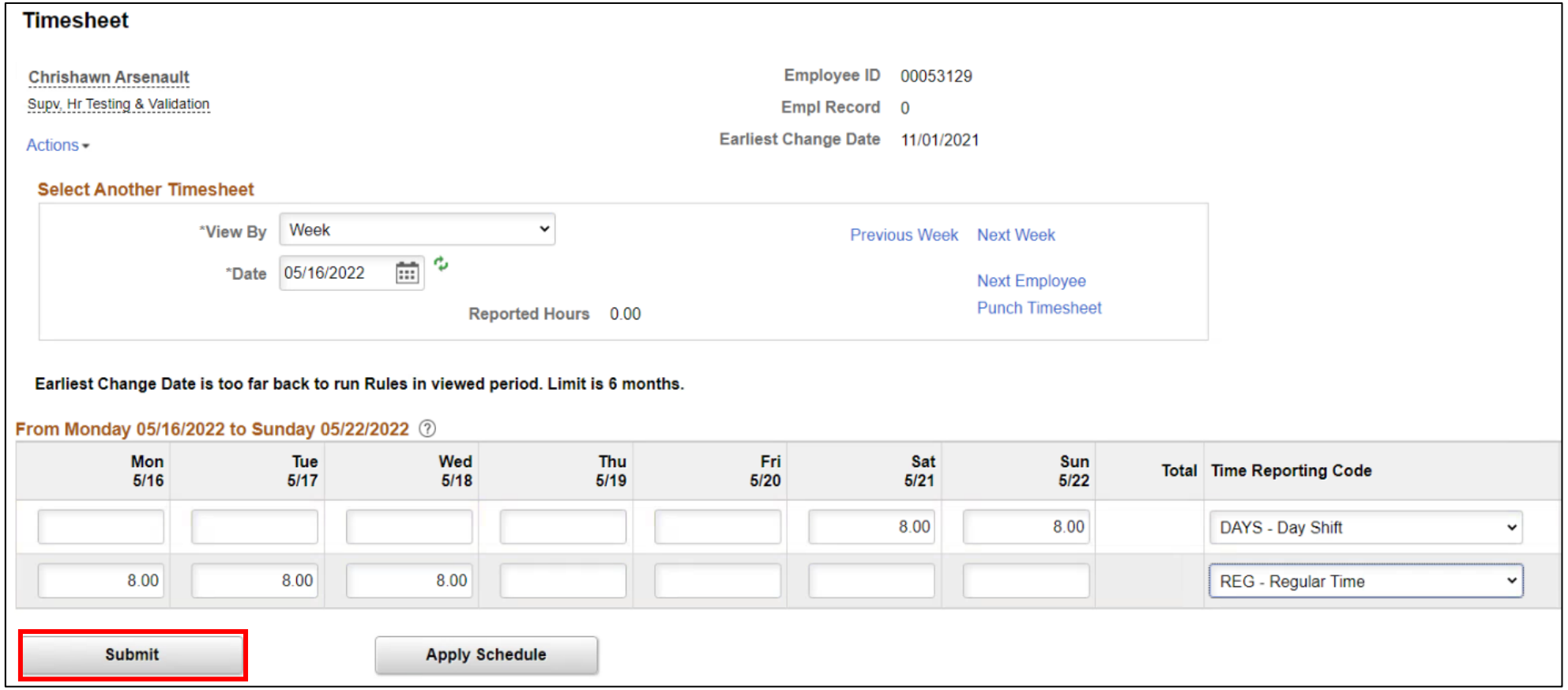
Lesson 1: Enter Time on Behalf of Employee Continued

4. Entered time and select the appropriate **Time Reporting Code** before Submitting the employee's time.



Lesson 1: Enter Time on Behalf of Employee Continued

5. Select **Submit**.



Lesson 1: Activities and Exercises

Lesson 1: Lesson Summary

Now that you have completed the lesson, you should be able to:

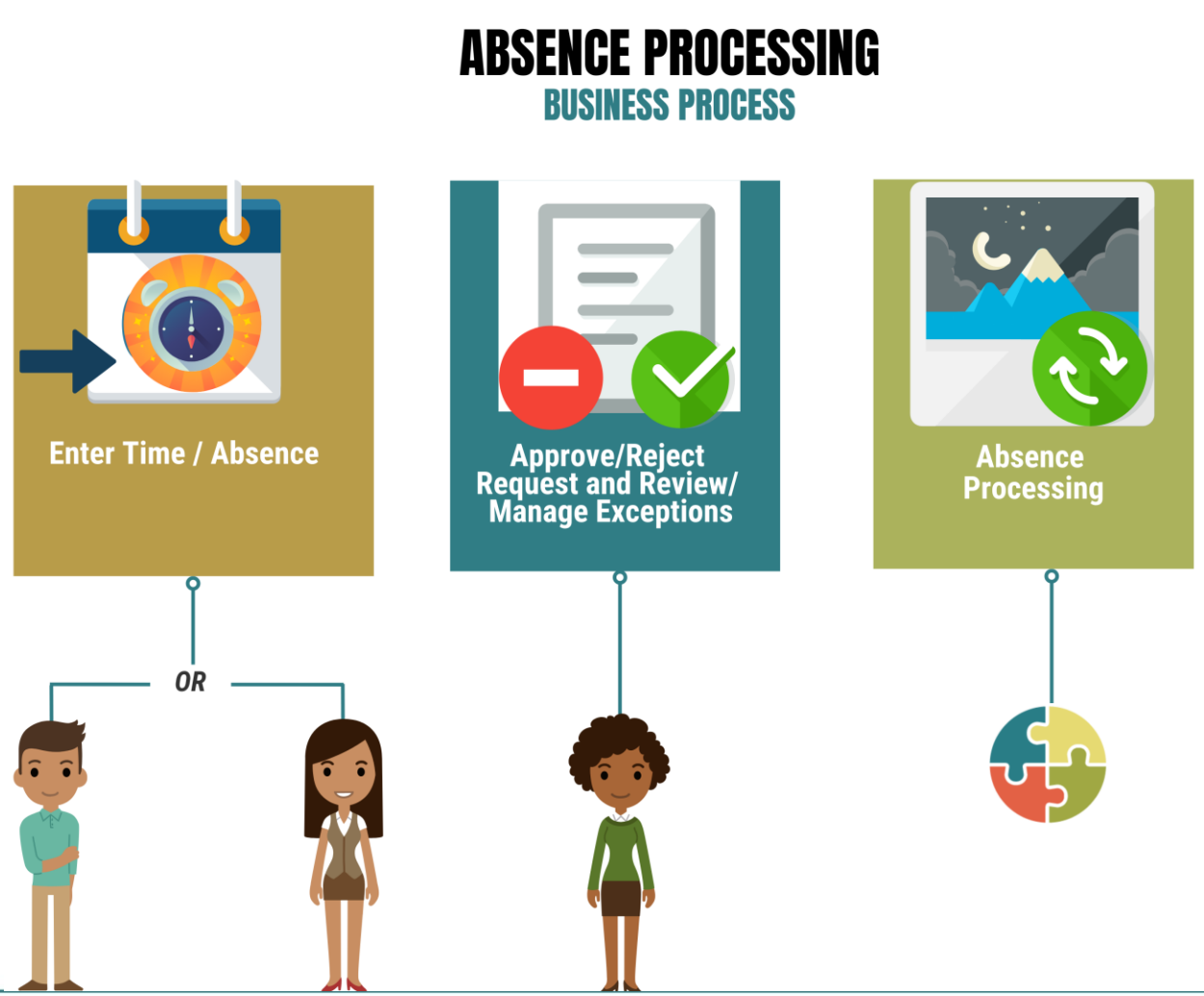
- Acknowledge the difference between reported and payable time
- Enter time on behalf of an employee using an elapsed timesheet

Lesson 2: Submit Absence on Behalf of Employee

At the conclusion of this lesson, you will be able to:

- Enter an Absence on Behalf of an Employee using Absence Management
- Submit Partial Day Absence on Behalf of an Employee

Lesson 2: Submit Absence on Behalf of Employee, Continued



ROLES AND DESCRIPTIONS

EMPLOYEE

The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses/Certifications).

TIMEKEEPER

The Timekeeper is responsible for keeping time and attendance at the department level; ensure completeness and accuracy of time.

MANAGER

The Manager is responsible for reviewing and approving HCM Module transaction types (Time & Labor, Absence, LOA, ePerformance, Retirement, Terminations, etc.) through Manager self-service functionality.

SYSTEM INFORMS

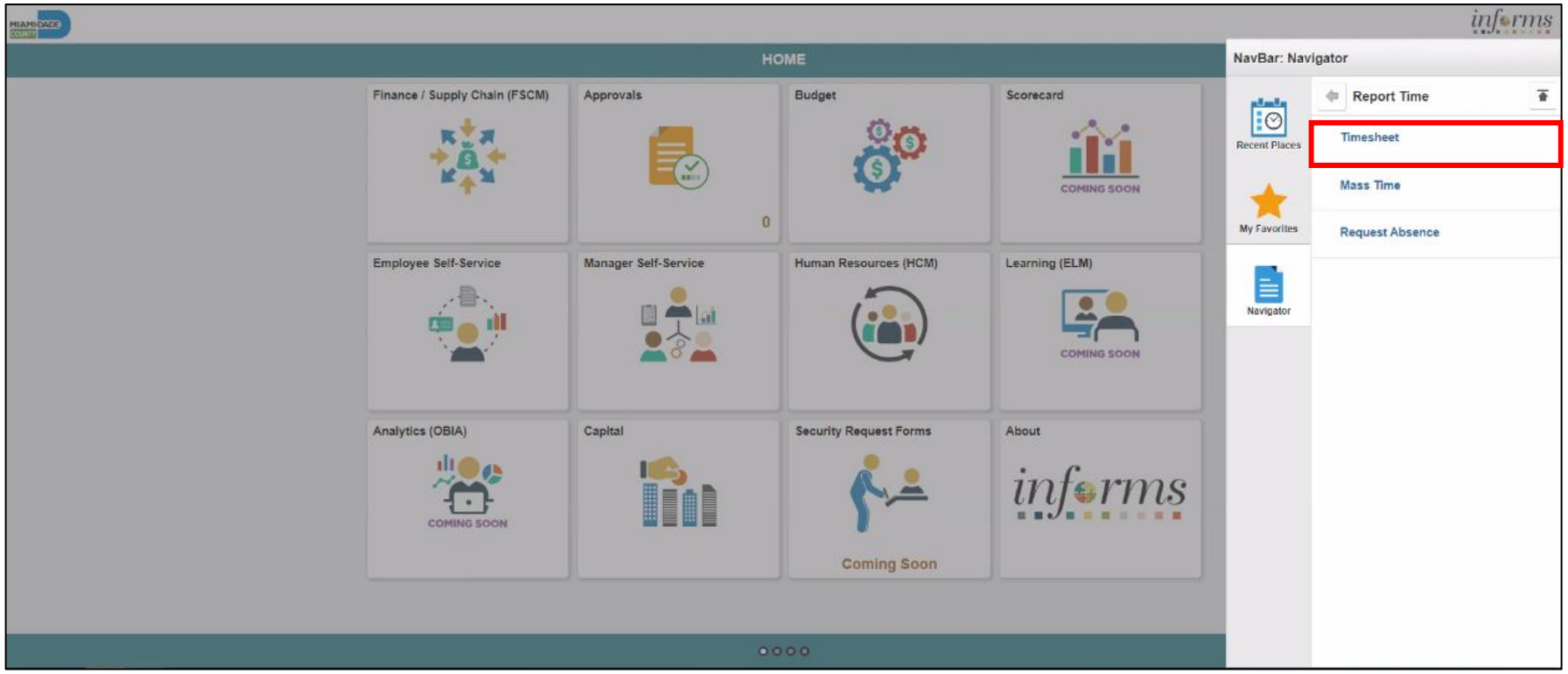
The administrative process that is performed.

Lesson 2: Key Terms

Term	Definition
Absence Event	The period for which an employee is absent for the same reason.
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically, in hours or partial.
Absence Balance	Leave balance available for the employee to use.
Absence Accrual	Periodic calculation of actual entitlement earned.
Absence Request	Method of entering leave, includes an Absence Type and Date(s).
Absence Take	Type of leave requested, linked to one or multiple TRC(s) (Time Reporting Code) in T&L (if cascading).
Process/Finalize Absence	The process to Calculate and close Absences for the current payroll period.

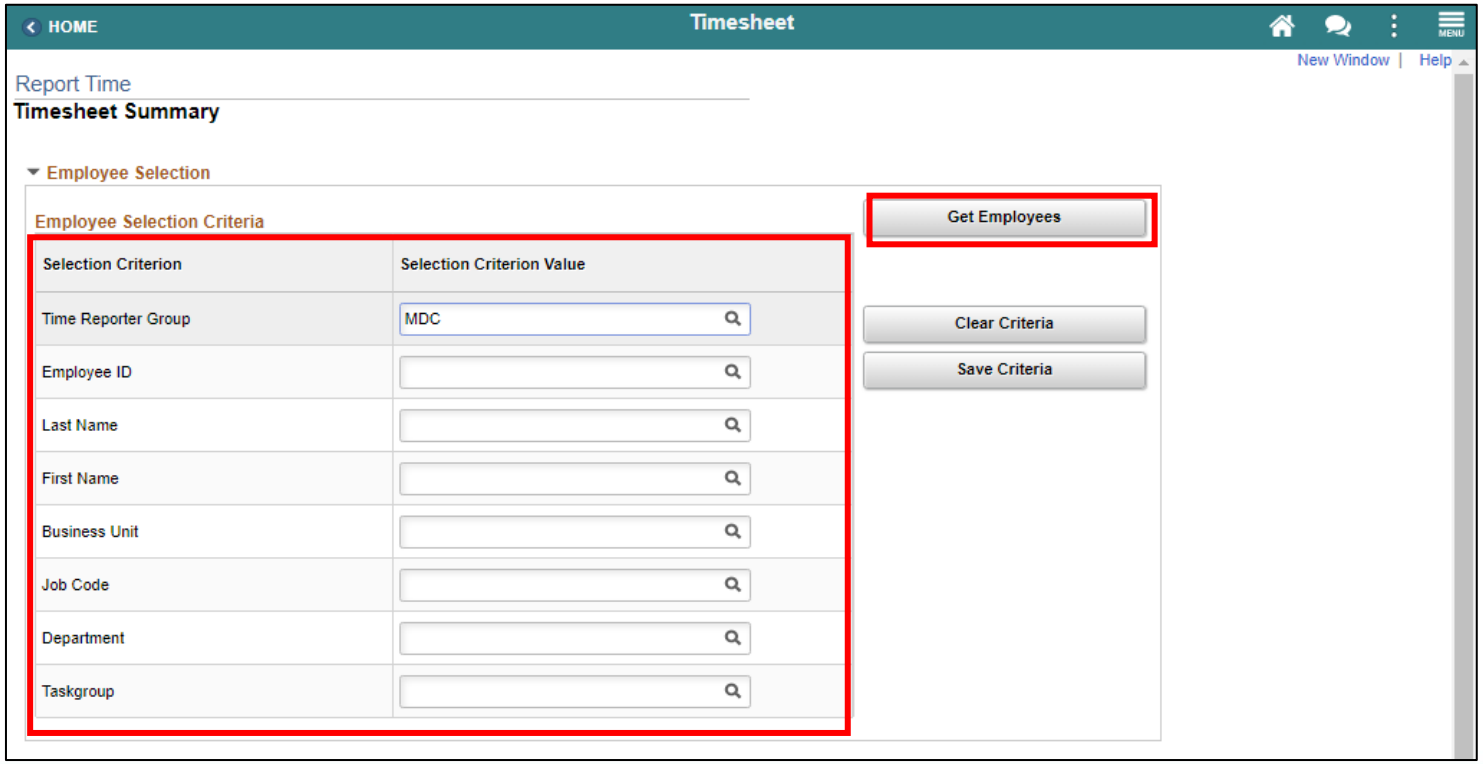
Lesson 2: Submit Absence on Behalf of Employee, Continued

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



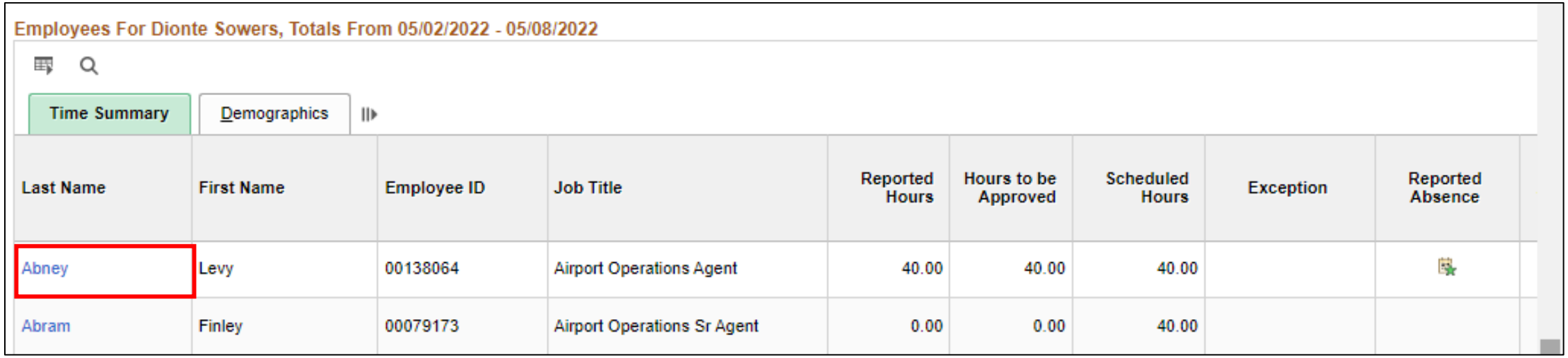
Lesson 2: Submit Absence on Behalf of Employee, Continued

2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 2: Submit Absence on Behalf of Employee, Continued

3. Select an employee's **Last Name** to display the details of the submitted reported time.

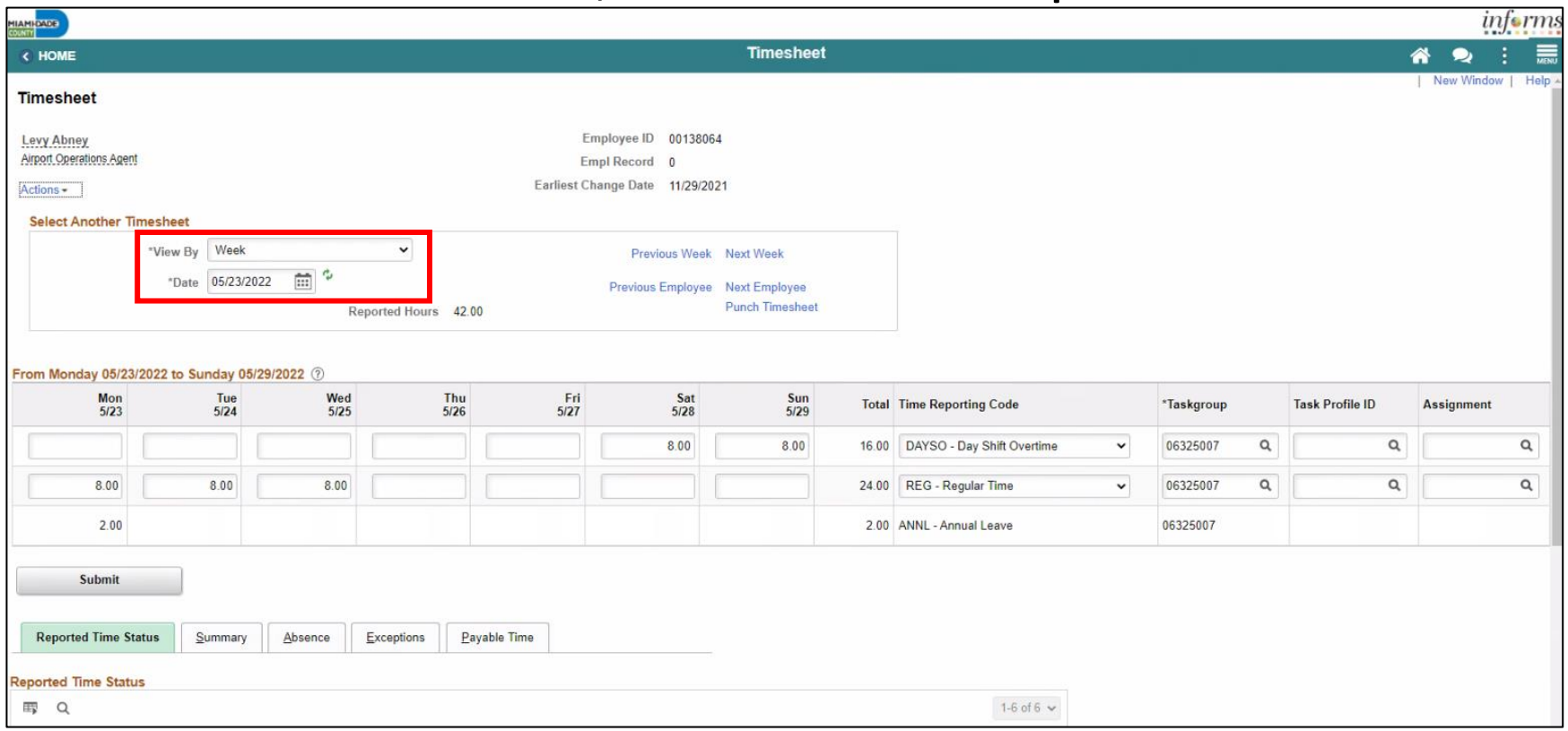


Last Name	First Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence
Abney	Levy	00138064	Airport Operations Agent	40.00	40.00	40.00		
Abram	Finley	00079173	Airport Operations Sr Agent	0.00	0.00	40.00		

Lesson 2: Submit Absence on Behalf of Employee, Continued

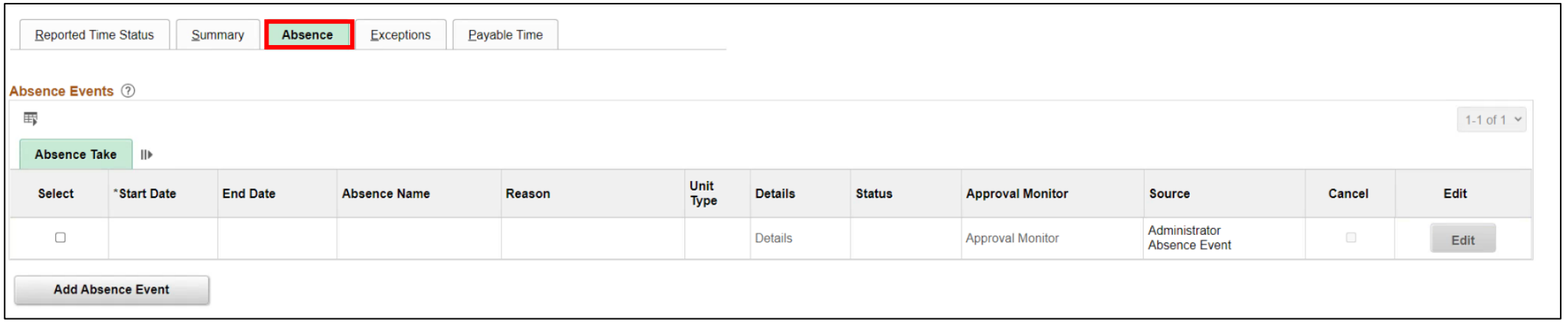
4. Select the appropriate week for the Absence Request.

Note: If the corresponding absence request is outside of the week indicated in this selection, the absence request will not be submitted.



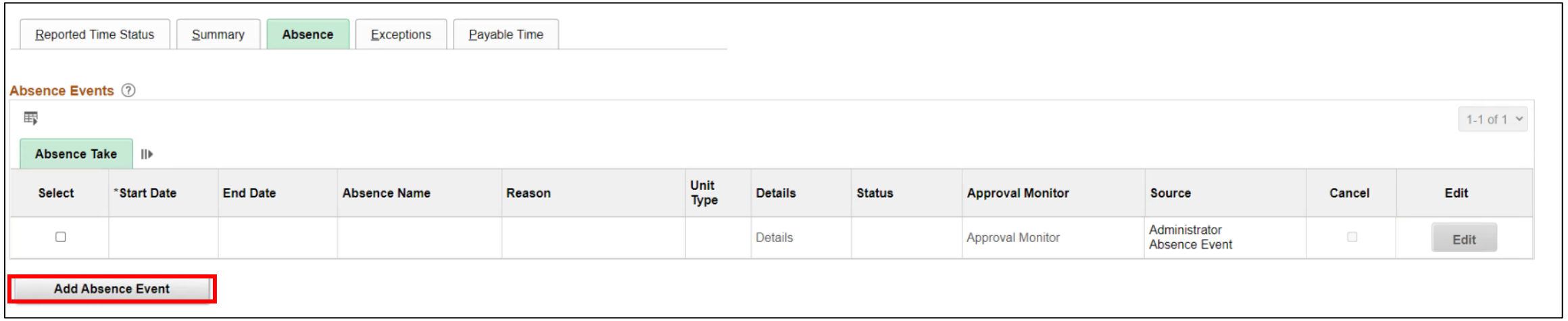
Lesson 2: Submit Absence on Behalf of Employee, Continued

5. Scroll to the **Absence** tab at the bottom of the employee timesheet.



Lesson 2: Submit Absence on Behalf of Employee, Continued

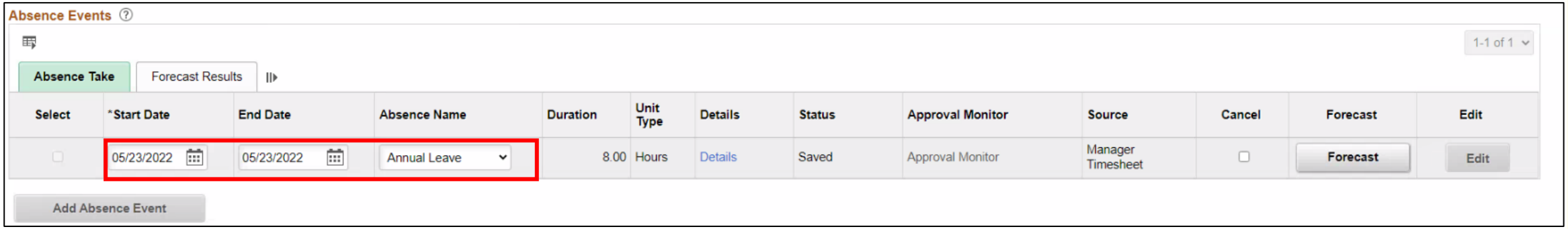
6. Select **Add Absence Event**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

7. Enter the following information:

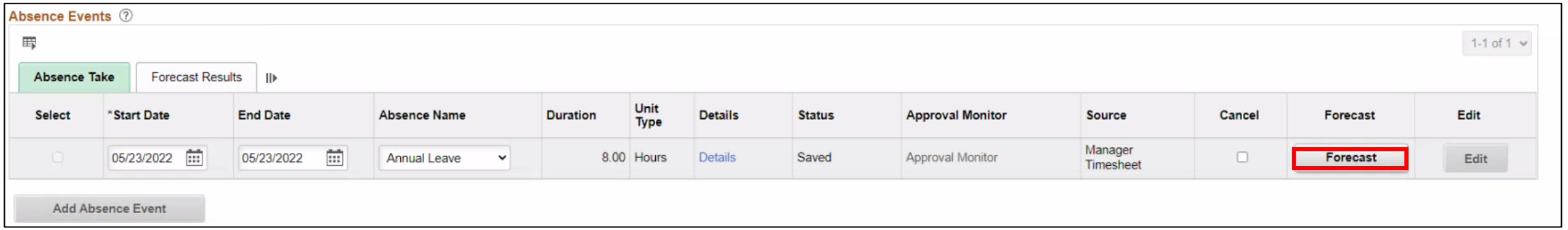
- **Start Data** and **End Date**
- **Absence Name***



Note: For Administrative Leave, INFORMS requires a Reason to be added. A **Reason** field will populate for entry. Reasons will not be required for other types of leave request.

Lesson 2: Submit Absence on Behalf of Employee, Continued

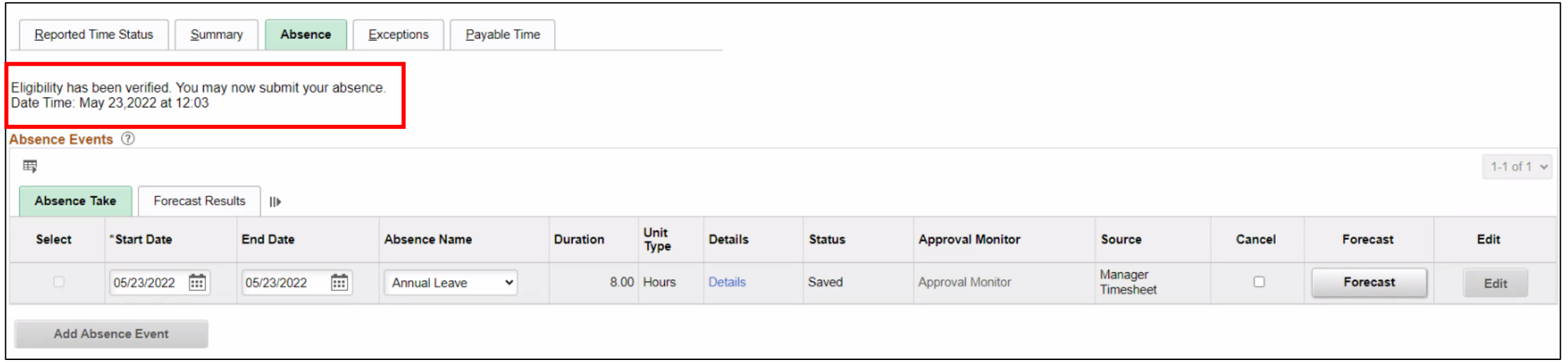
8. Select **Forecast** to confirm if the employee is eligible for the absence type.



Note: To submit Absence Event, Timekeepers must forecast prior to submitting the leave request.

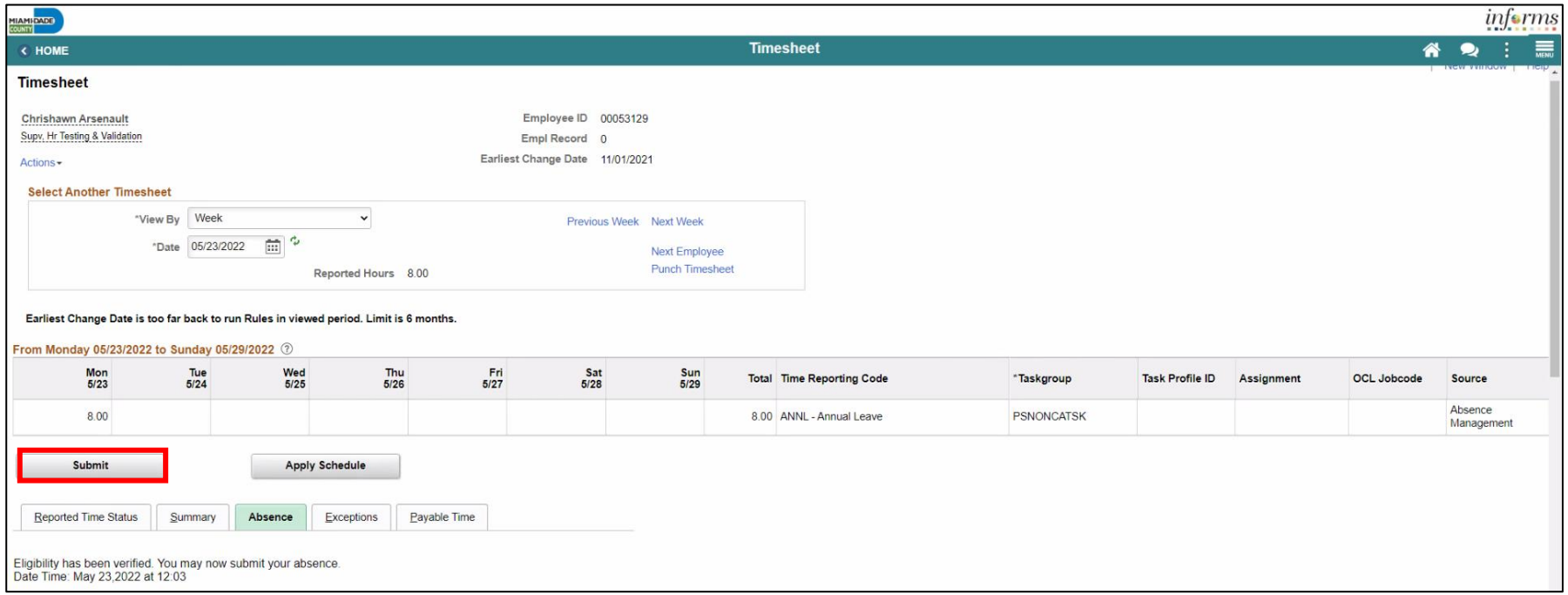
Lesson 2: Submit Absence on Behalf of Employee, Continued

INFORMS provides confirmation if the employee is eligible for the absence type. INFORMS will confirm if the eligibility has been verified and if the employee can submit absence.



Lesson 2: Submit Absence on Behalf of Employee, Continued

9. Select **Submit**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

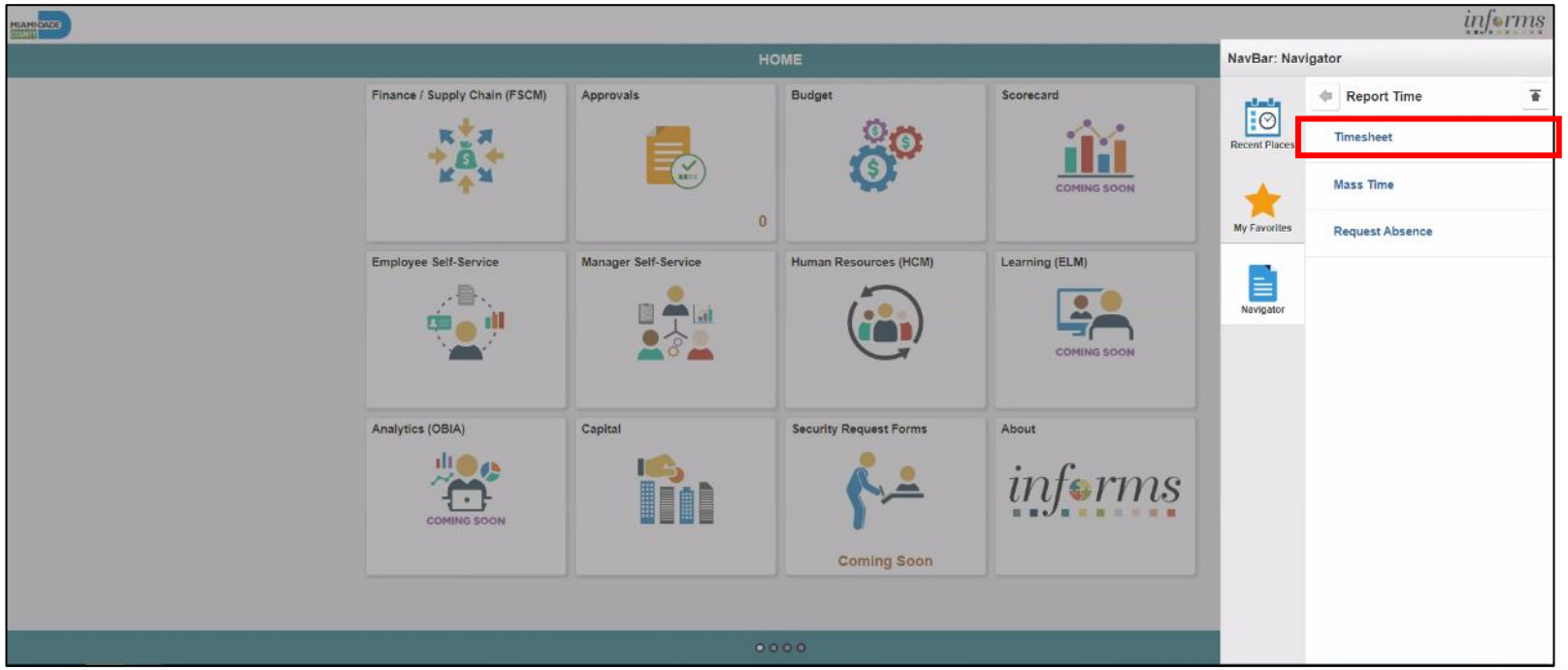
10. Select **OK**.

Lesson 2: Submit Absence on Behalf of Employee, Continued

Submit Partial Day Absence on Behalf of an Employee

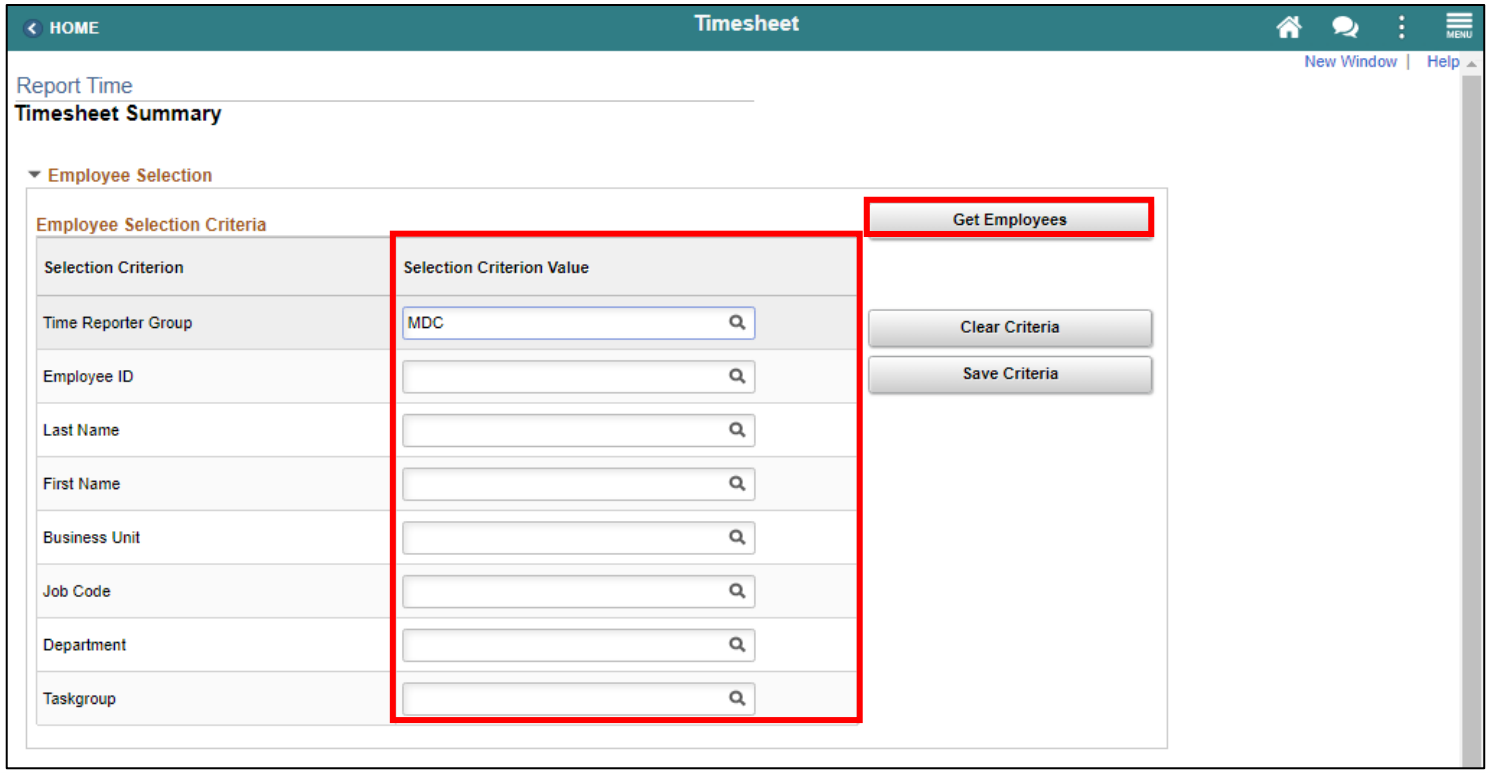
In addition to the all-day absence, Timekeepers can submit partial day absences on behalf of an employee.

1. Navigation: **Human Resources (HCM) > Manager Self Service > Time Management > Report Time > Timesheet.**



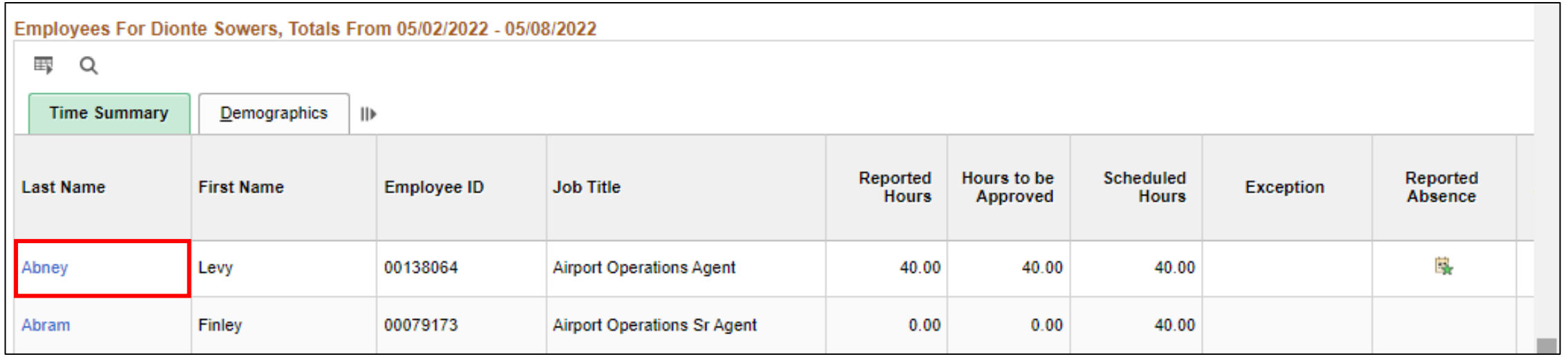
Lesson 2: Submit Absence on Behalf of Employee, Continued

2. Populate the **Employee Selection Criteria** and then select **Get Employees** to display the reported time of a group of employees or an individual employee.



Lesson 2: Submit Absence on Behalf of Employee, Continued

3. Select an employee's **Last Name** to display the details of the submitted reported time.



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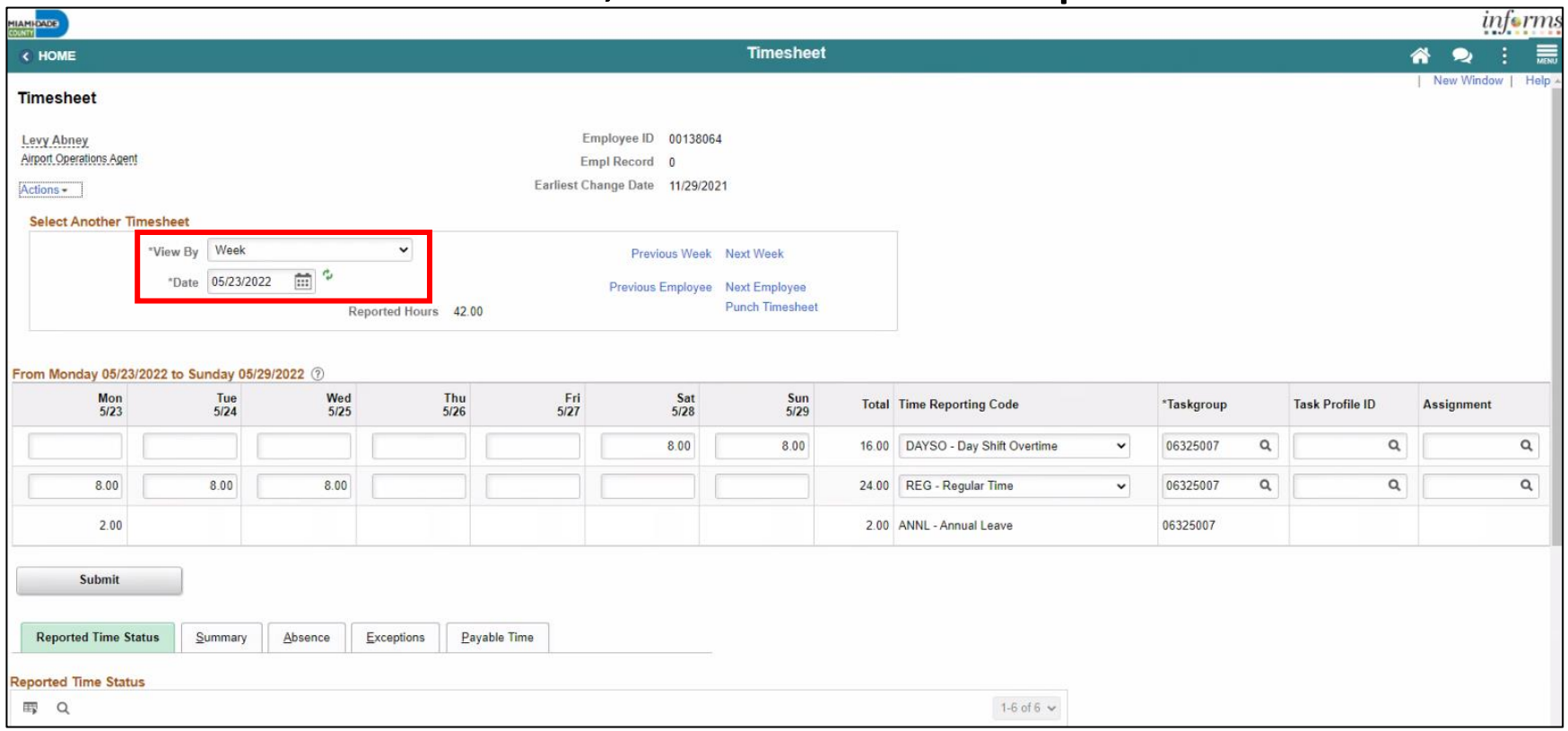
Lesson 2: Submit Absence on Behalf of Employee, Continued

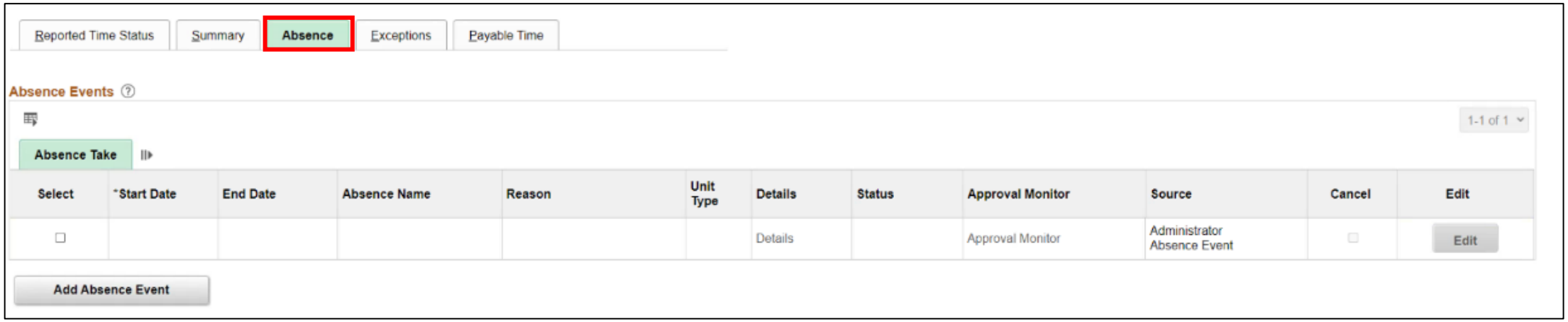
4. Select the appropriate week for the Absence Request.

Note: If the corresponding absence request is outside of the week indicated in this selection, the absence request will not be submitted.



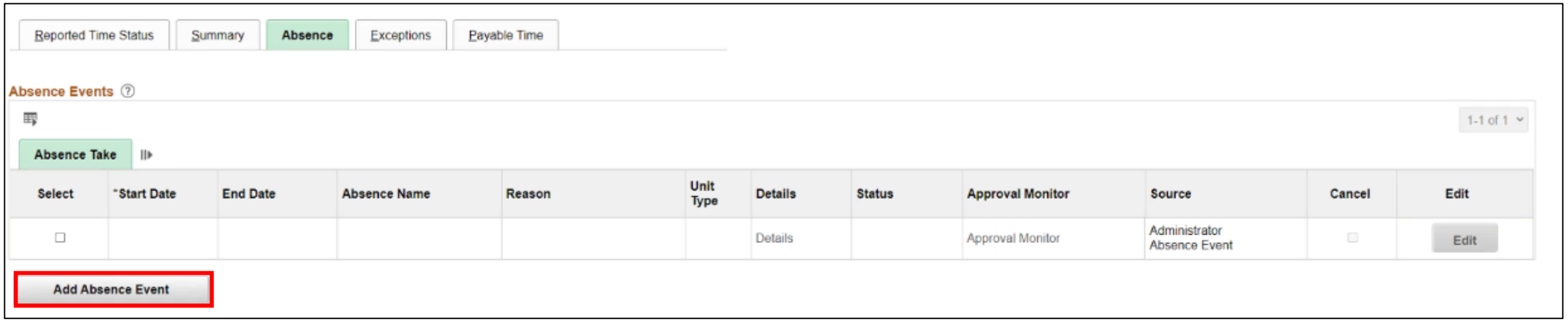
Lesson 2: Submit Absence on Behalf of Employee, Continued

5. Scroll to the **Absence** tab at the bottom of the employee timesheet._



Lesson 2: Submit Absence on Behalf of Employee, Continued

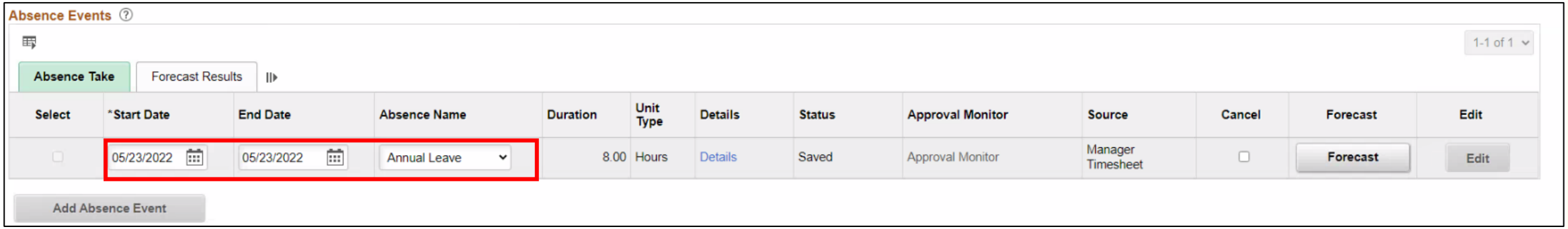
6. Select **Add Absence Event**._



Lesson 2: Submit Absence on Behalf of Employee, Continued

7. Enter the following information:

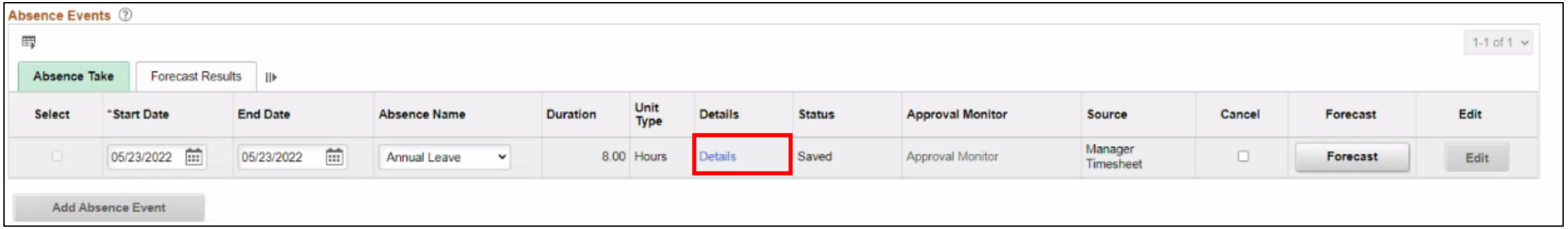
- **Start Data** and **End Date**
- **Absence Name***



Note: For Administrative Leave, INFORMS requires a Reason to be added. A **Reason** field will populate for entry. Reasons will not be required for other types of leave request.

Lesson 2: Submit Absence on Behalf of Employee, Continued

8. Select **Details.**

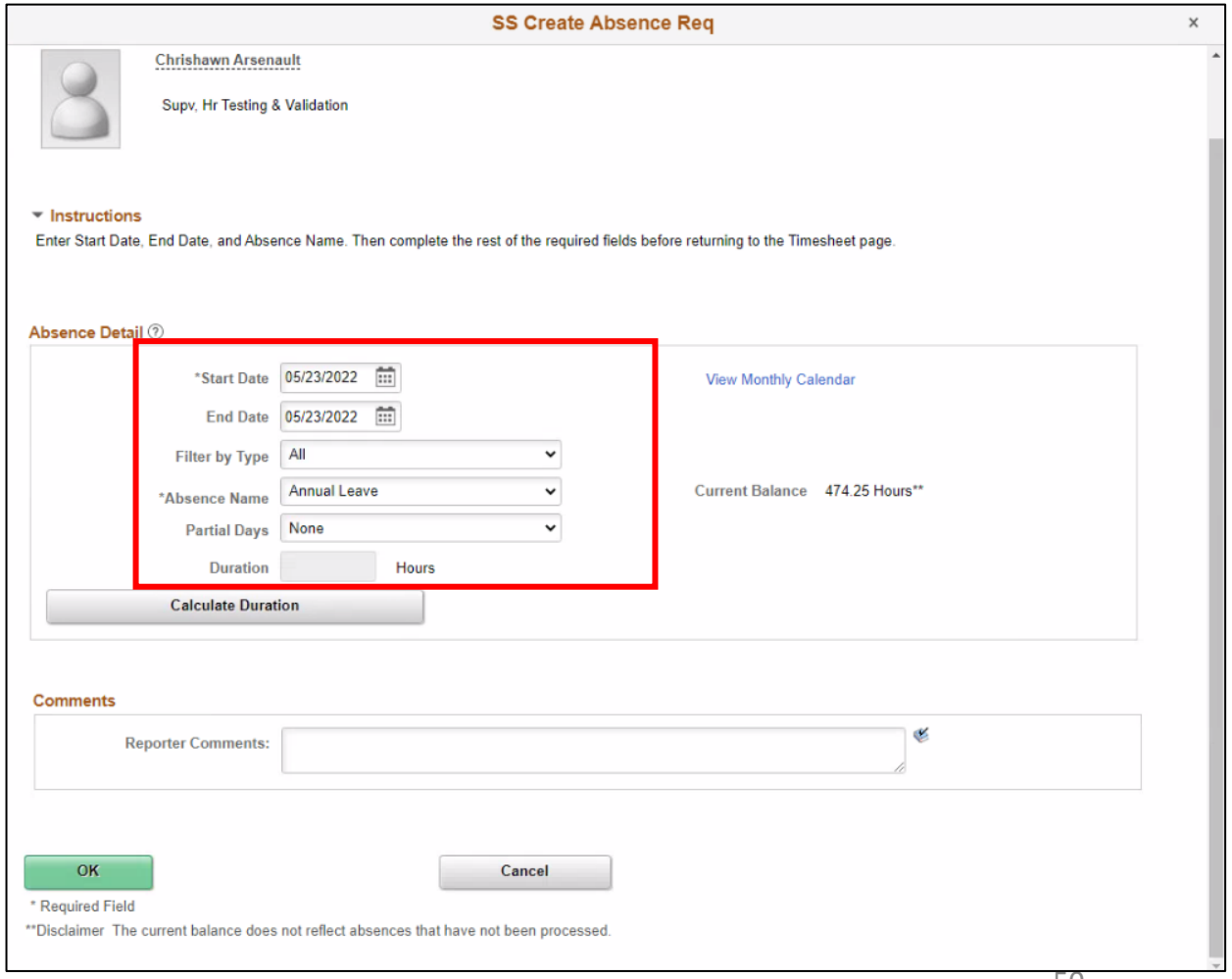


Lesson 2: Submit Absence on Behalf of Employee, Continued

9. In the Absence Event Details page, the following fields are available:

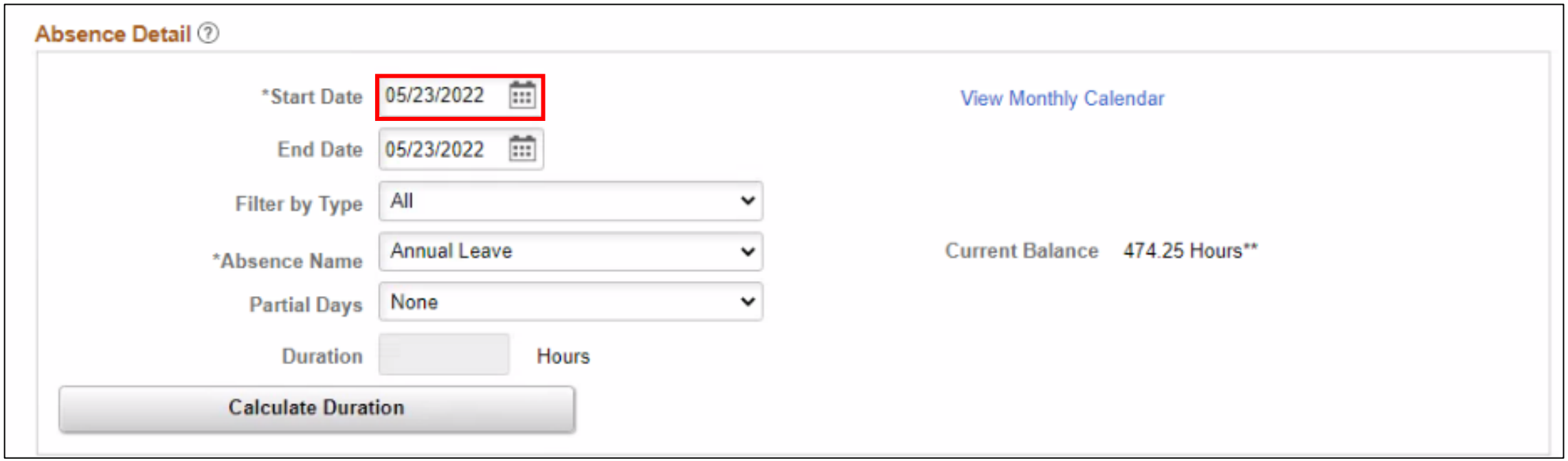
- **State Date***
- **End Date**
- **Filter by Type**
- **Absence Name***
- **Partial Days**
- **Duration**

Note: Fields with asterisks (*) are required fields.



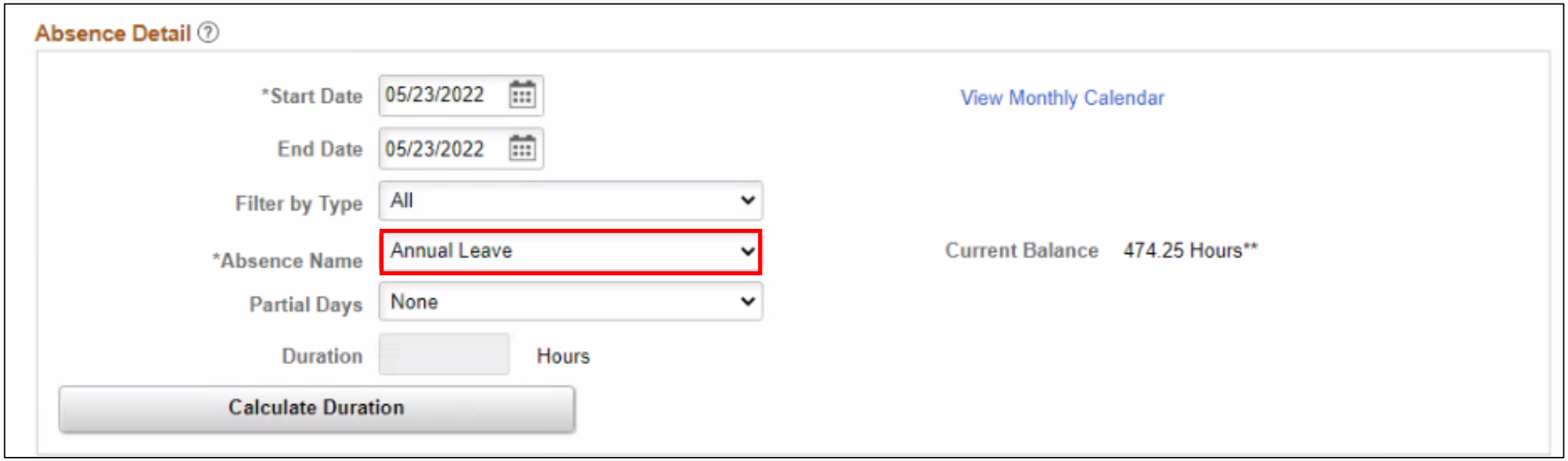
Lesson 2: Submit Absence on Behalf of Employee, Continued

10. Enter the **Start Date**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

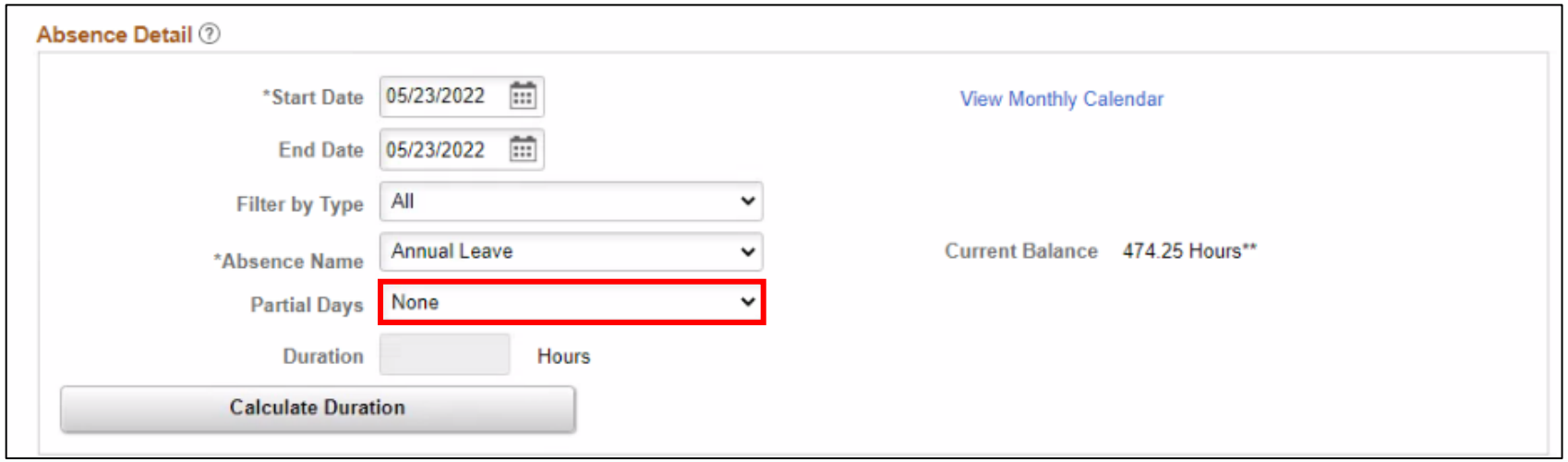
11. Enter the **Absence Name**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

12. Select the **Partial Days**.

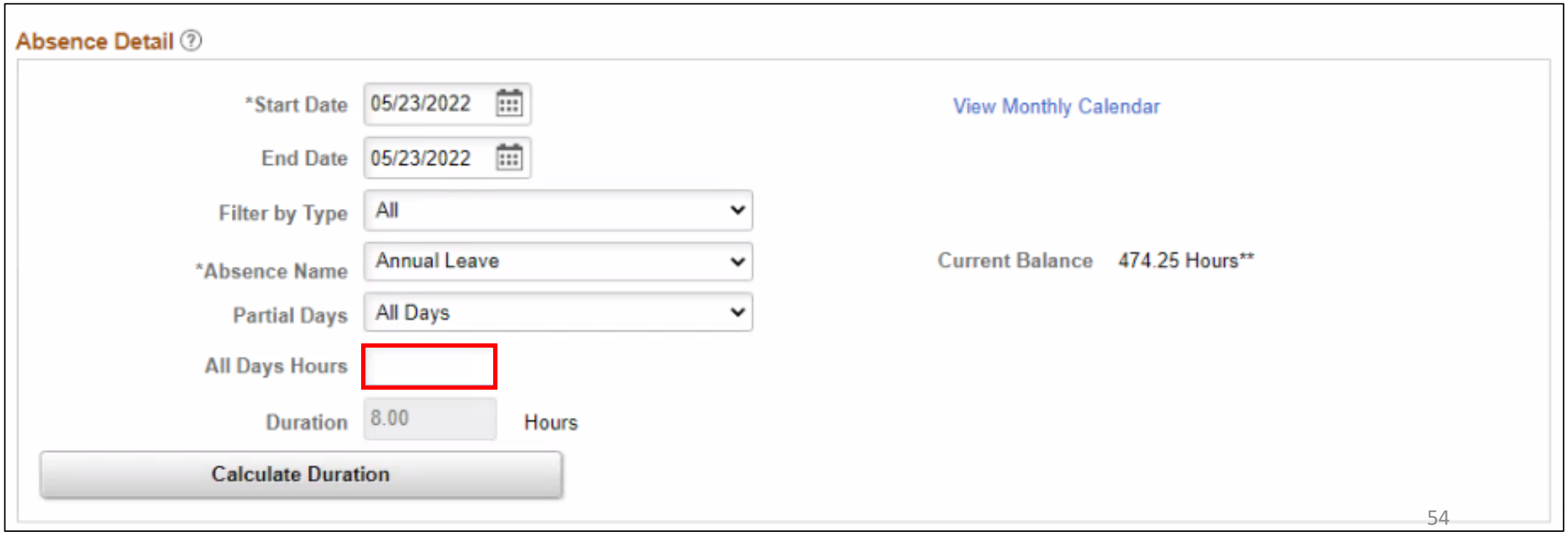
- All Days
- End Day Only
- None
- Start Day Only
- Start and End Days



Lesson 2: Submit Absence on Behalf of Employee, Continued

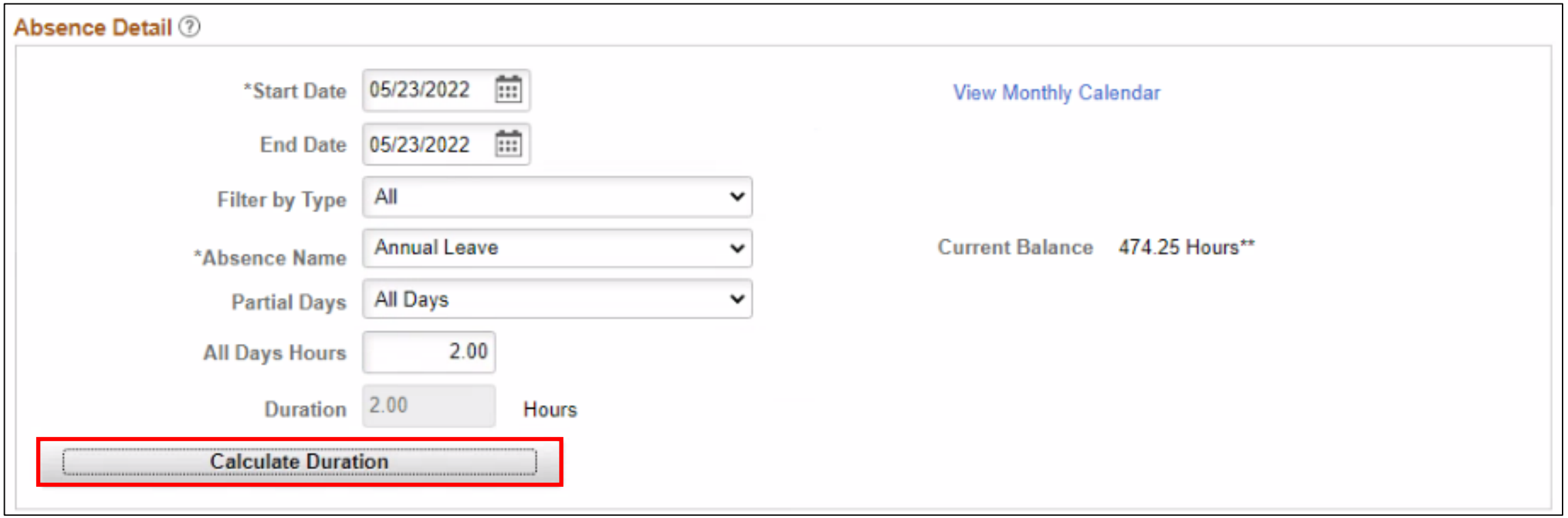
13. Enter the **All Days Hours**.

Note: Once the **Partial Days** are selected the **All Days Hours** field will populate.



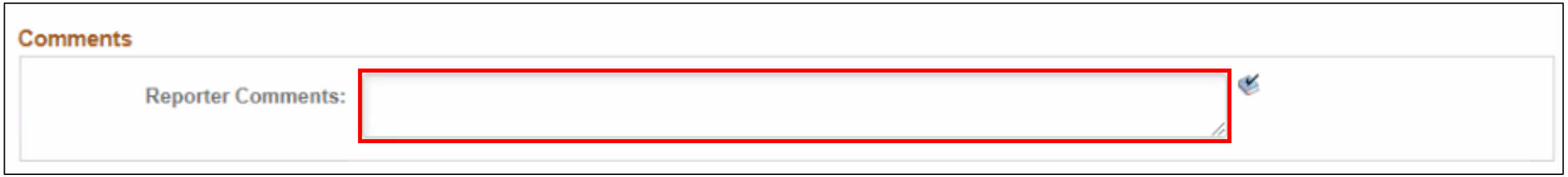
Lesson 2: Submit Absence on Behalf of Employee, Continued

14. Select **Calculate Duration**.



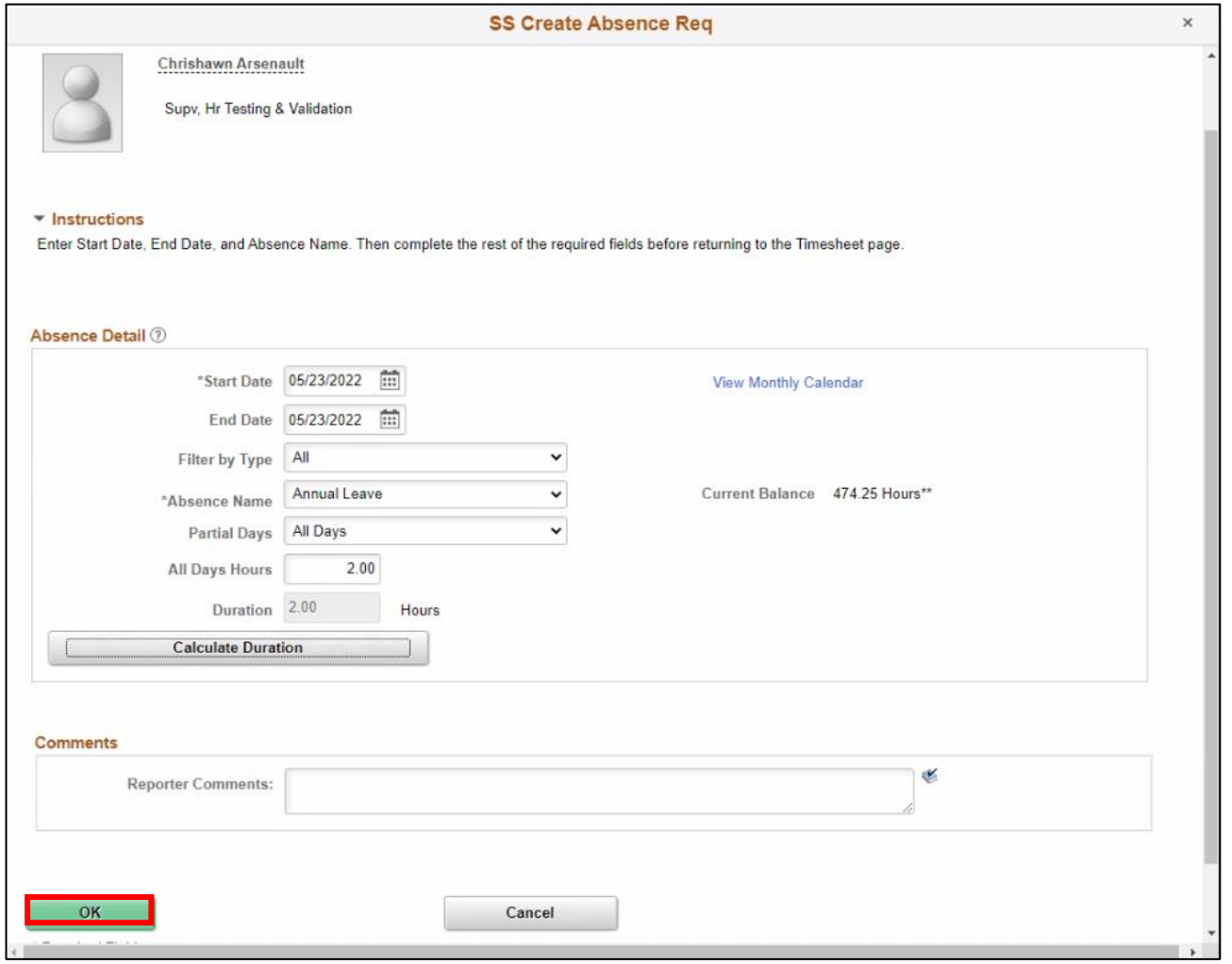
Lesson 2: Submit Absence on Behalf of Employee, Continued

15. If needed, add comments in the **Reporter Comments** field.



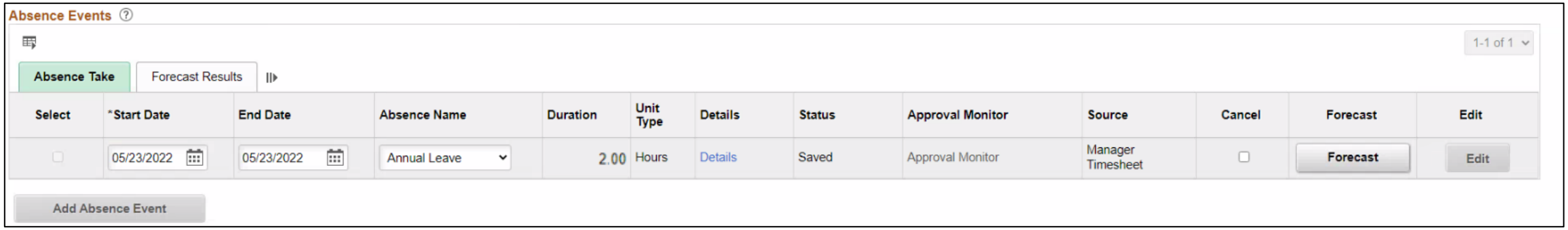
Lesson 2: Submit Absence on Behalf of Employee, Continued

16. Select **OK**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

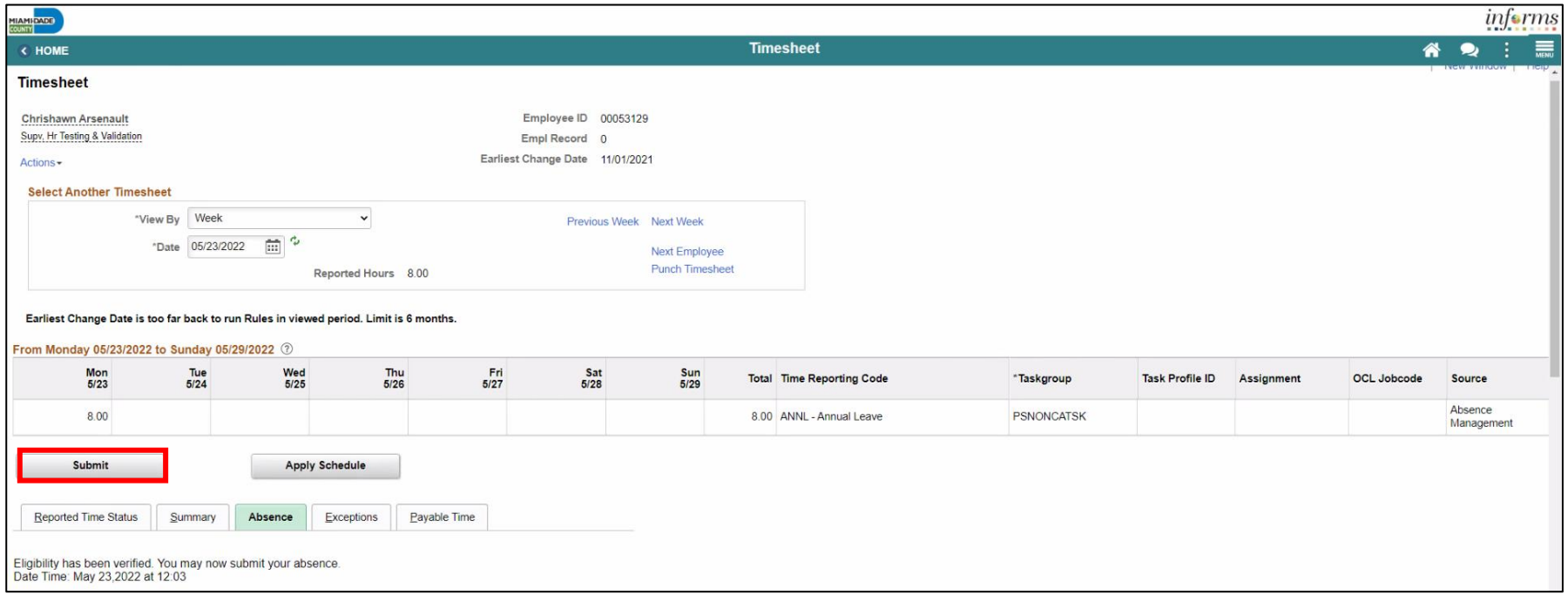
17. Select **Forecast** to confirm if the employee is eligible for the absence type.



Note: To submit Absence Event, Timekeepers must forecast prior to submitting the leave request.

Lesson 2: Submit Absence on Behalf of Employee, Continued

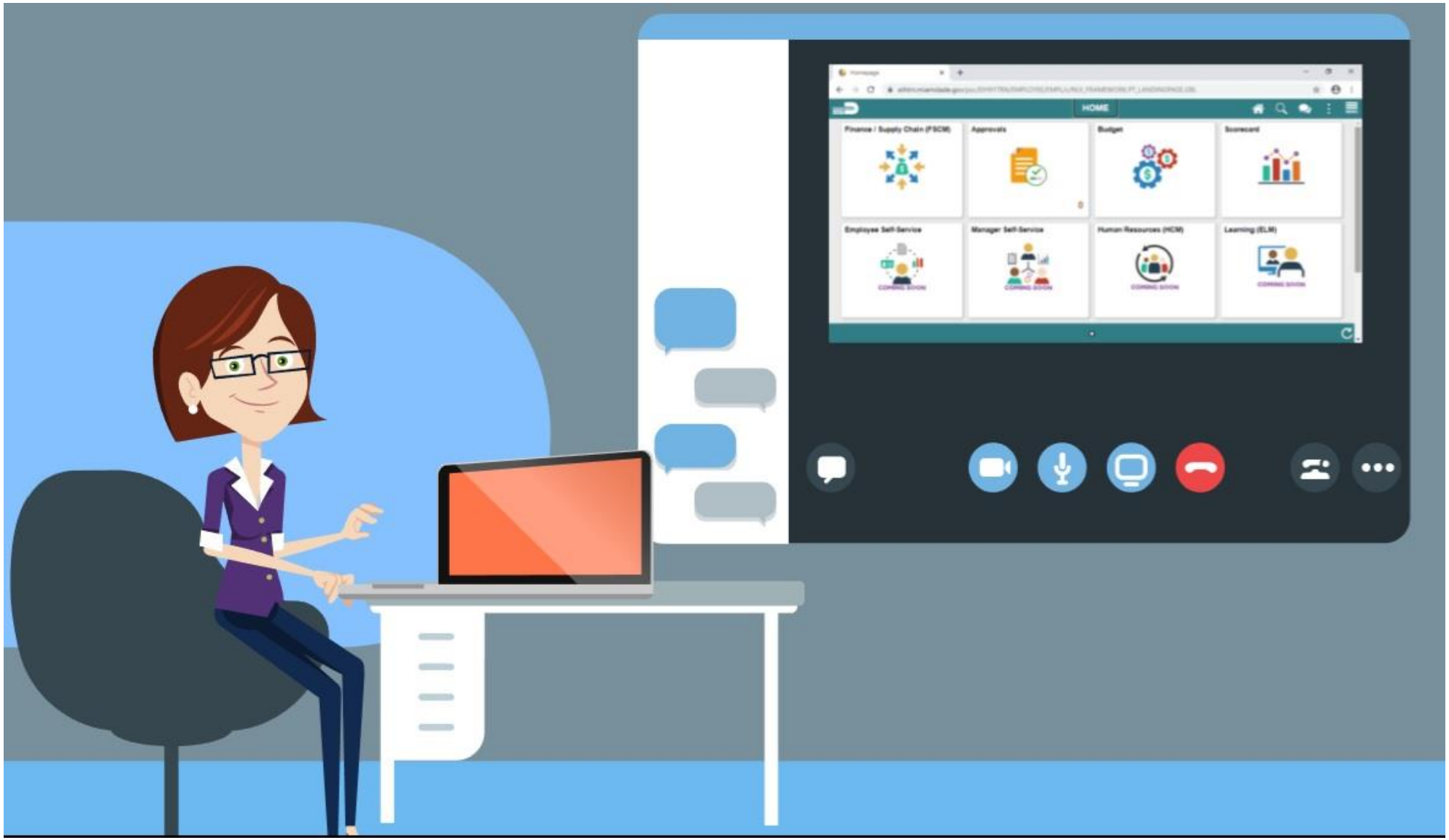
18. Select **Submit**.



Lesson 2: Submit Absence on Behalf of Employee, Continued

19. Select **OK**.

Lesson 2: Activities and Exercises



Lesson 2: Lesson Summary

Now that you have completed the Submit Absence on Behalf of Employee lesson, you should be able to:

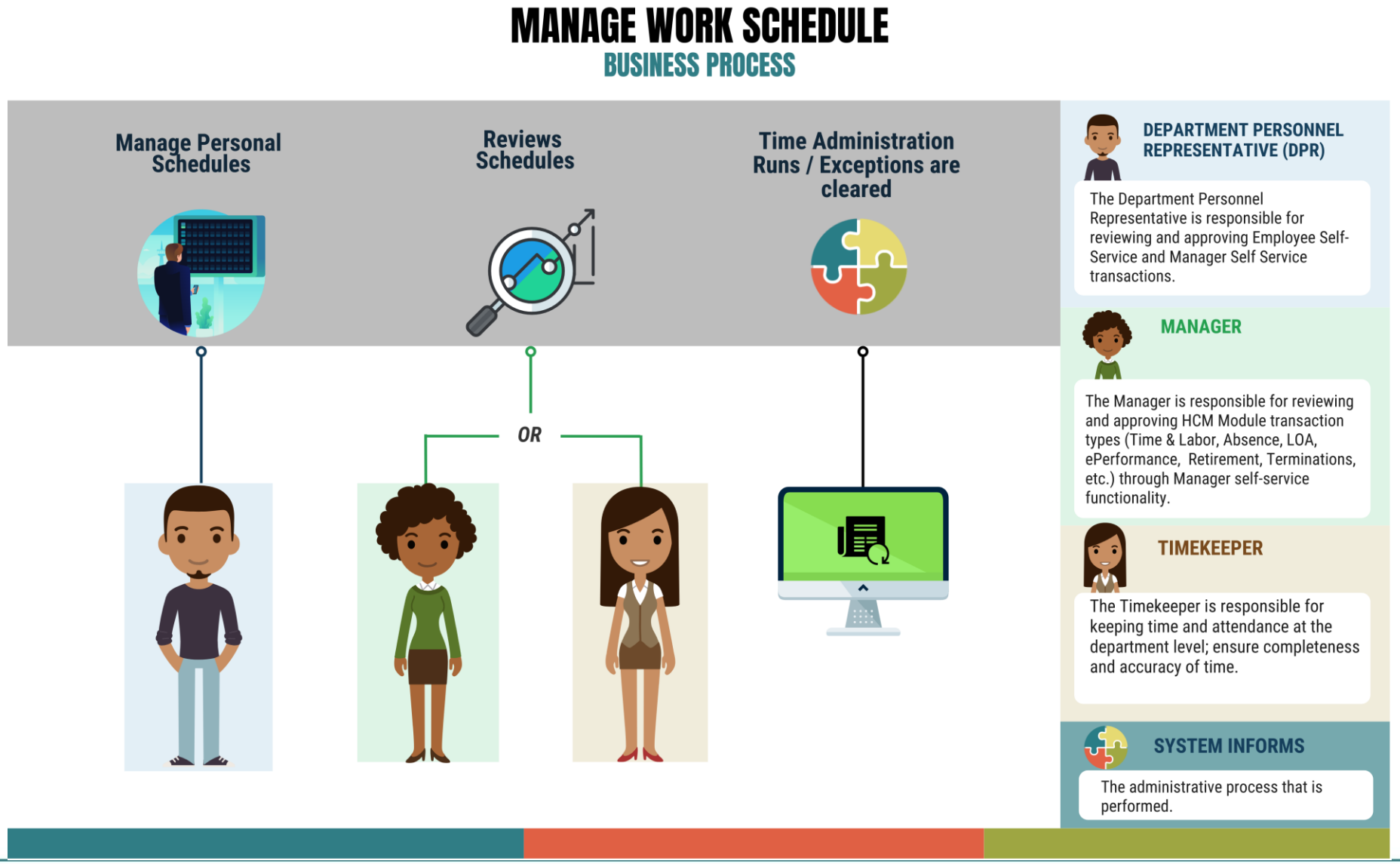
- Enter an Absence on Behalf of an Employee using Absence Management
- Submit Partial Day Absence on Behalf of an Employee

Lesson 3: Manage Work Schedule

At the conclusion of this lesson, you will be able to:

- Understand the Elapsed Schedule
- Assign a Personal Schedule
- Manage Schedules

Lesson 3: Manage Work Schedule, Continued



Lesson 3: Key Terms

Term	Definition
Elapsed Schedule	Schedule that shows the duration of time that the employee worked. i.e. the employee worked eight hours on Monday, forty hours for the week.

Lesson 3: Manage Work Schedule, Continued

The following topics will be discussed in this lesson:

- Overview of Schedules
- Assigning a Personal Schedule
- Managing Schedules
  - Overriding Employee Schedules

Lesson 3: Manage Work Schedule, Continued

Overview of Schedules

- Work schedules are being implemented to validate absences only and are not being used to track actual start and end times for an employee.
- Elapsed Schedule is the only schedule that could be assigned to an employee:
  - Elapsed Schedule: Elapsed schedules show the duration of time that the employee worked. For example, the employee worked eight hours on Monday, forty hours for the week.
  - Schedules are maintained to validate time and absence entries.
  - These leave entries can be days of the week an employee has taken leave or the number of hours an employee is off for a specified day.

Lesson 3: Manage Work Schedule, Continued

Process Changes

The following are important changes to note that occur due to this implementation:

- In the legacy system, a user could use a default template to prepopulate a timesheet.
- In INFORMS, all time reporters must enter the hours worked based on the time reporting template assigned on the Time Reporter Data page.
- At the department level, only personal schedules are configured in INFORMS.
- In INFORMS, the Timekeeper has the ability to create a personal schedule

Lesson 3: Manage Work Schedule, Continued

Overview of Schedules

End-to-end Process

Below is the flow for assigning and maintaining schedules:

The **Department Personnel Representative (DPR)** administers time → A personal schedule is assigned to the employee → The employee is able to view the schedule → If applicable the employee and managers schedule is available for adjustments or overrides

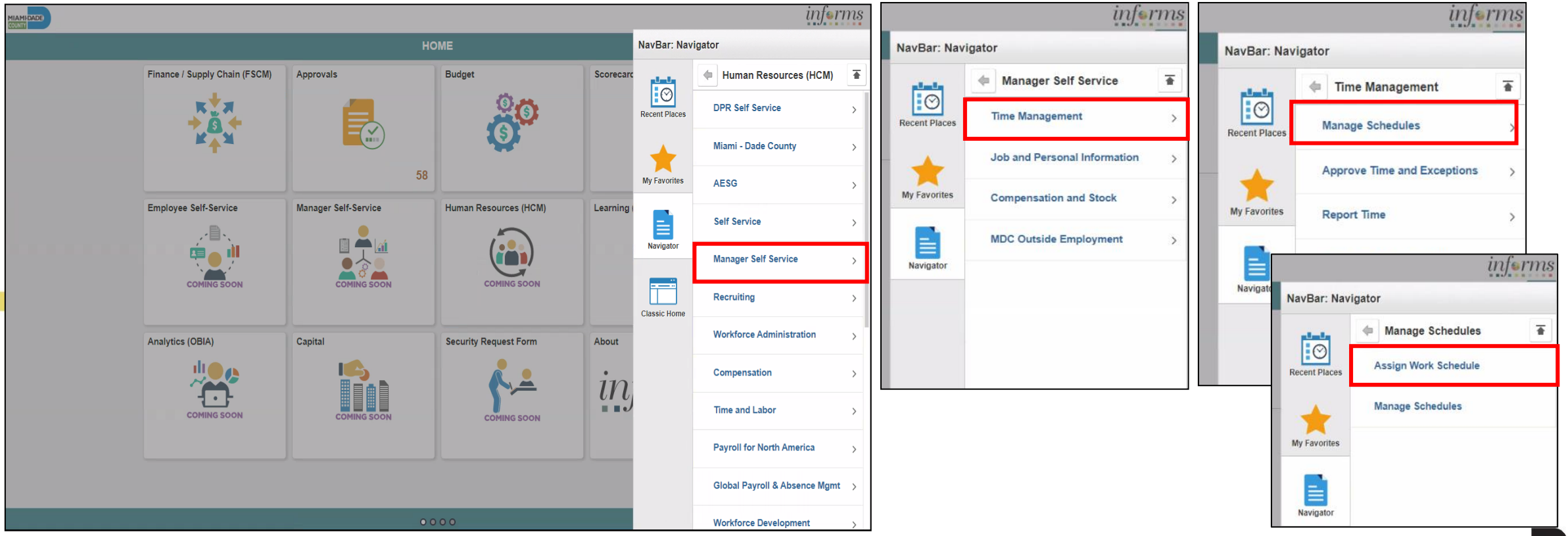
Schedules need to be assigned or changed for employees in the following scenarios:

- When an employee is hired and becomes active in INFORMS for the first time
- When an employee is rehired into INFORMS
- When an active employee has a change in the expected daily hours or workdays

Lesson 3: Manage Work Schedule, Continued

Assigning a Personal Schedule

1. NavBar Navigation: **Human Resources (HCM) > Manage Self Service > Time Management > Manage Schedules > Assign Work Schedule.**



Lesson 3: Manage Work Schedule, Continued

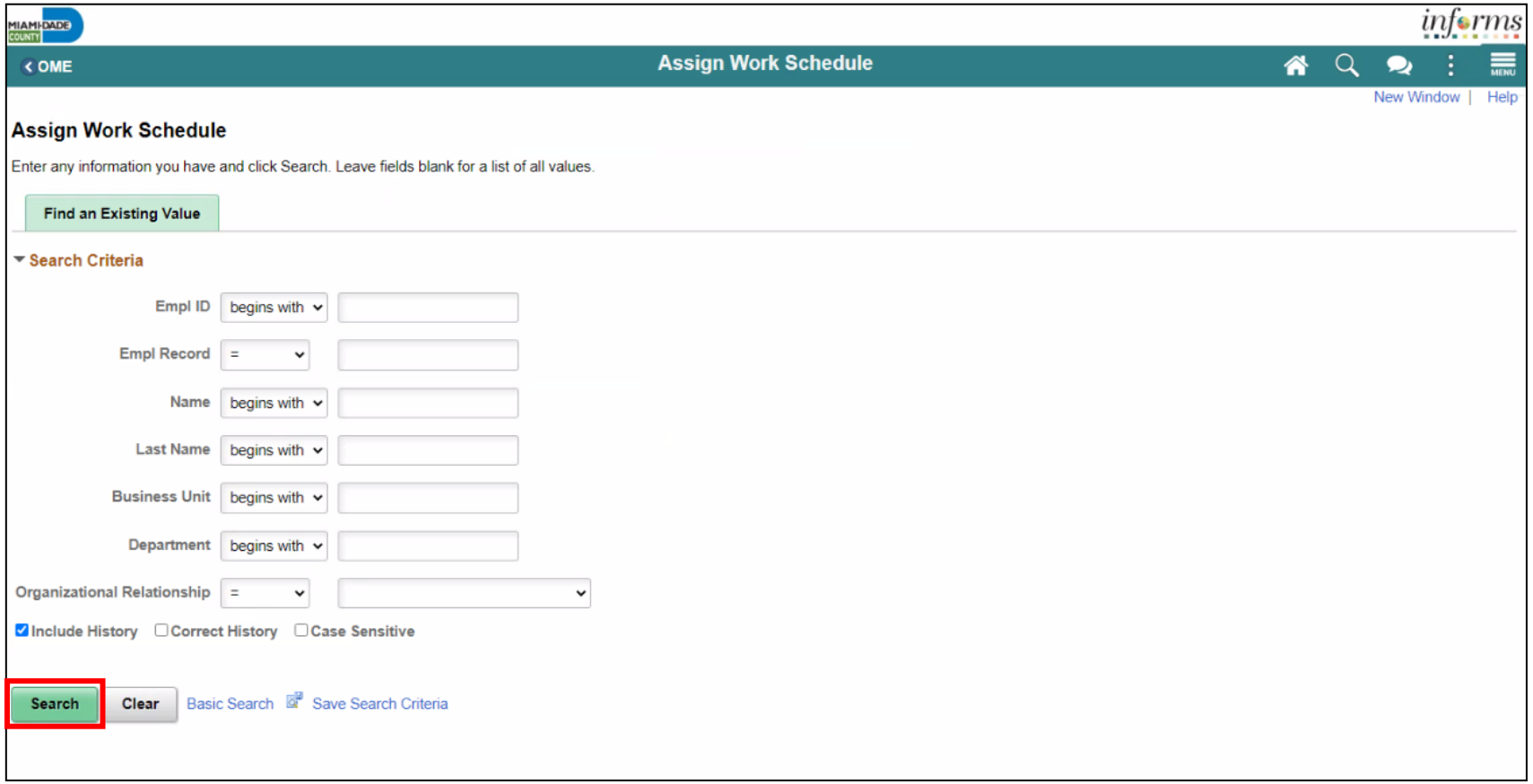
2. On the Assign Work Schedule search page, enter any of the following search criteria:

- **Empl ID**
- **Empl Record**
- **Name**
- **Last Name**
- **Business Unit**
- **Department**
- **Organizational Relationship**

Lesson 3: Manage Work Schedule, Continued

3. When all search criteria are entered, Select **Search**.

   Note: If more than one absence request displays in the search results based on your search criteria, select the applicable employee. If there is only one employee that meets the search criteria.

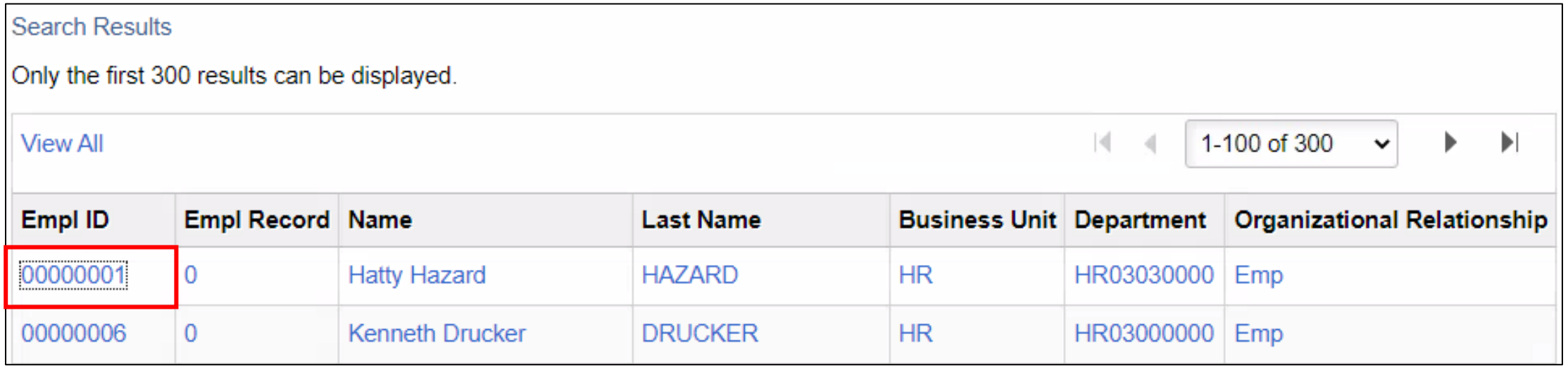


Lesson 3: Manage Work Schedule, Continued

4. Review the **Search Results**.

Note: If there are more than 100 search results, the first 100 will be available. Select the **right arrow** or **Last** to review additional search results.

5. Find the correct employee and Select on the **Empl ID** to open the **Assign Work Schedule** page for that employee.


Search Results

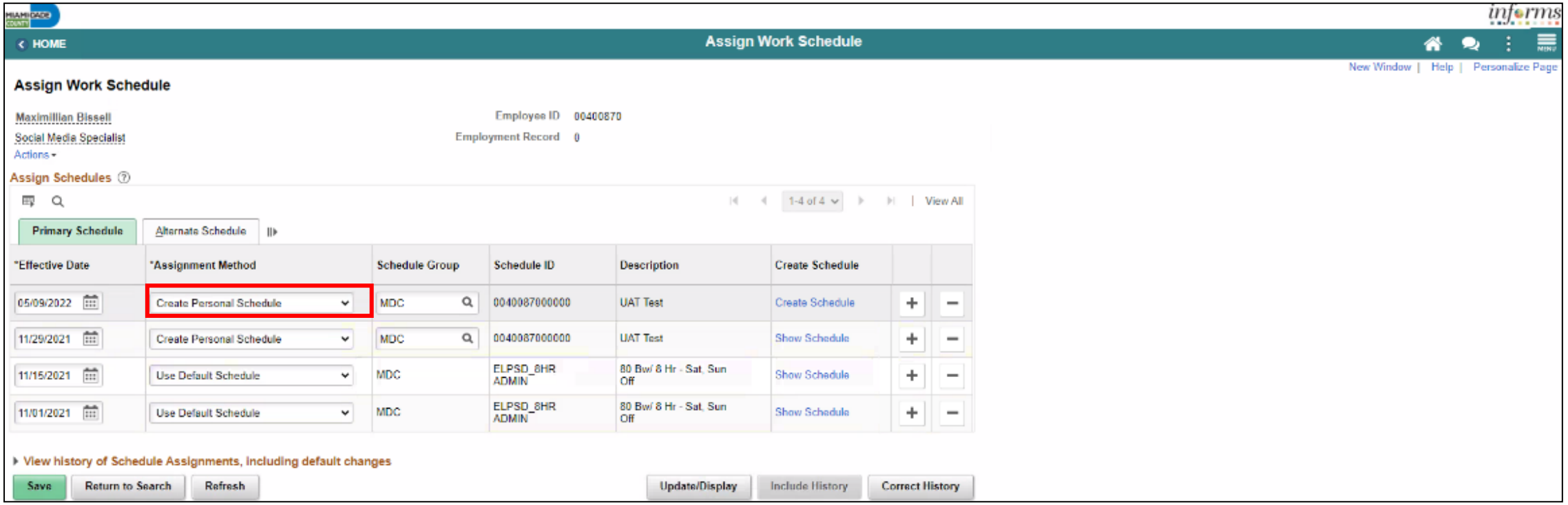
Only the first 300 results can be displayed.

View All 1-100 of 300

Empl ID	Empl Record	Name	Last Name	Business Unit	Department	Organizational Relationship
00000001	0	Hatty Hazard	HAZARD	HR	HR03030000	Emp
00000006	0	Kenneth Drucker	DRUCKER	HR	HR03000000	Emp

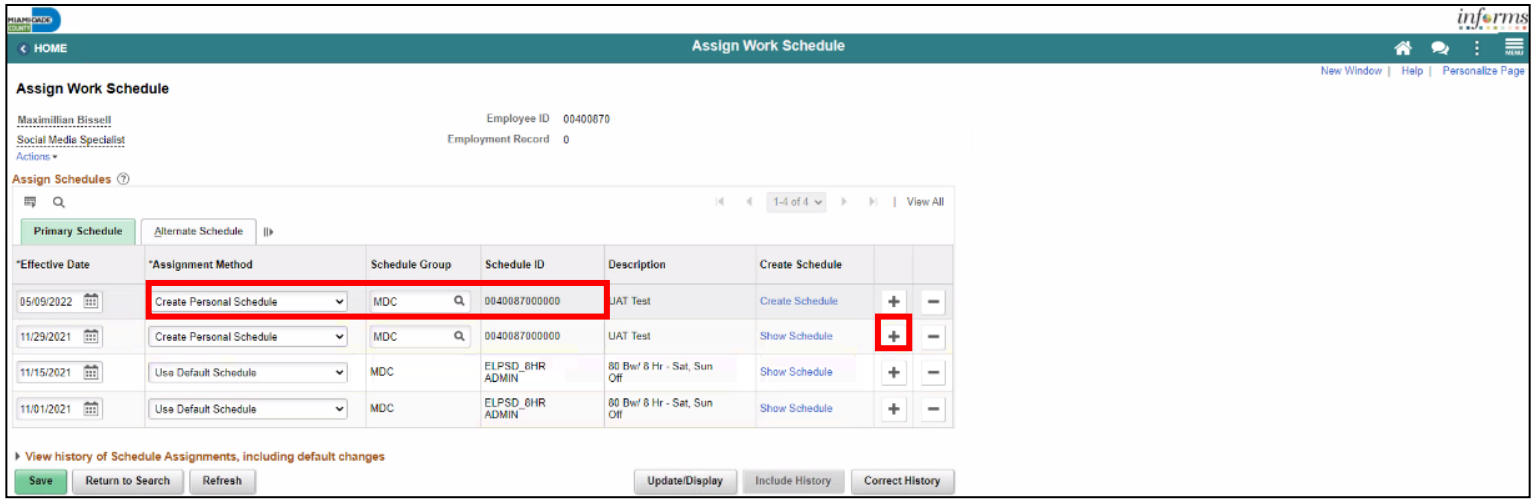
Lesson 3: Manage Work Schedule, Continued

6. On the **Assign Work Schedule** page, change the **Assignment Method** from the *Use Default Schedule* option to *Select Personal Schedule* if there is no schedule previously assigned to the employee.



Lesson 3: Manage Work Schedule, Continued

7. If there is a schedule assigned to the employee, select the **plus sign (+)** to add a new **Effective Date** and a new schedule assignment. After *Select Personal Schedule* is selected, it activates the **Schedule Group** and **Schedule ID** fields.



NOTE: Select the **plus sign (+)** on the top row

a. Enter the **Effective Date** of the assigned schedule. The effective date cannot be older than the prior assignment.

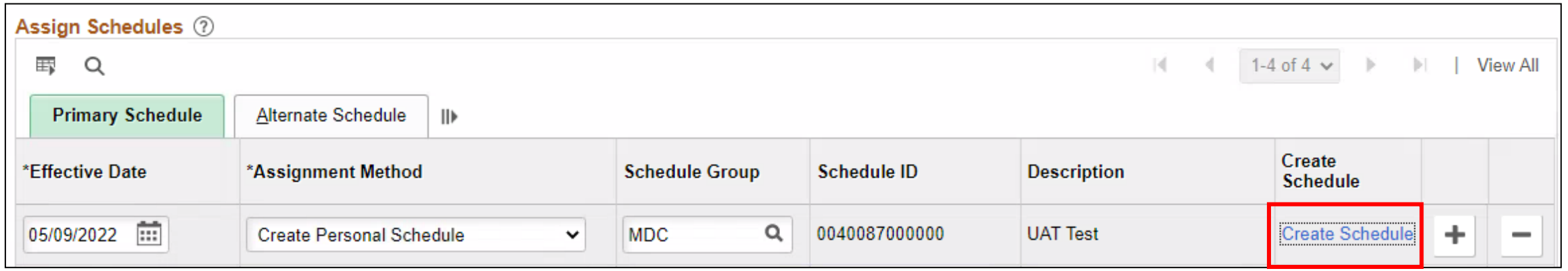
b. Enter the **Schedule Group.**

Lesson 3: Manage Work Schedule, Continued

Once the fields are entered, the **Description** will update accordingly.

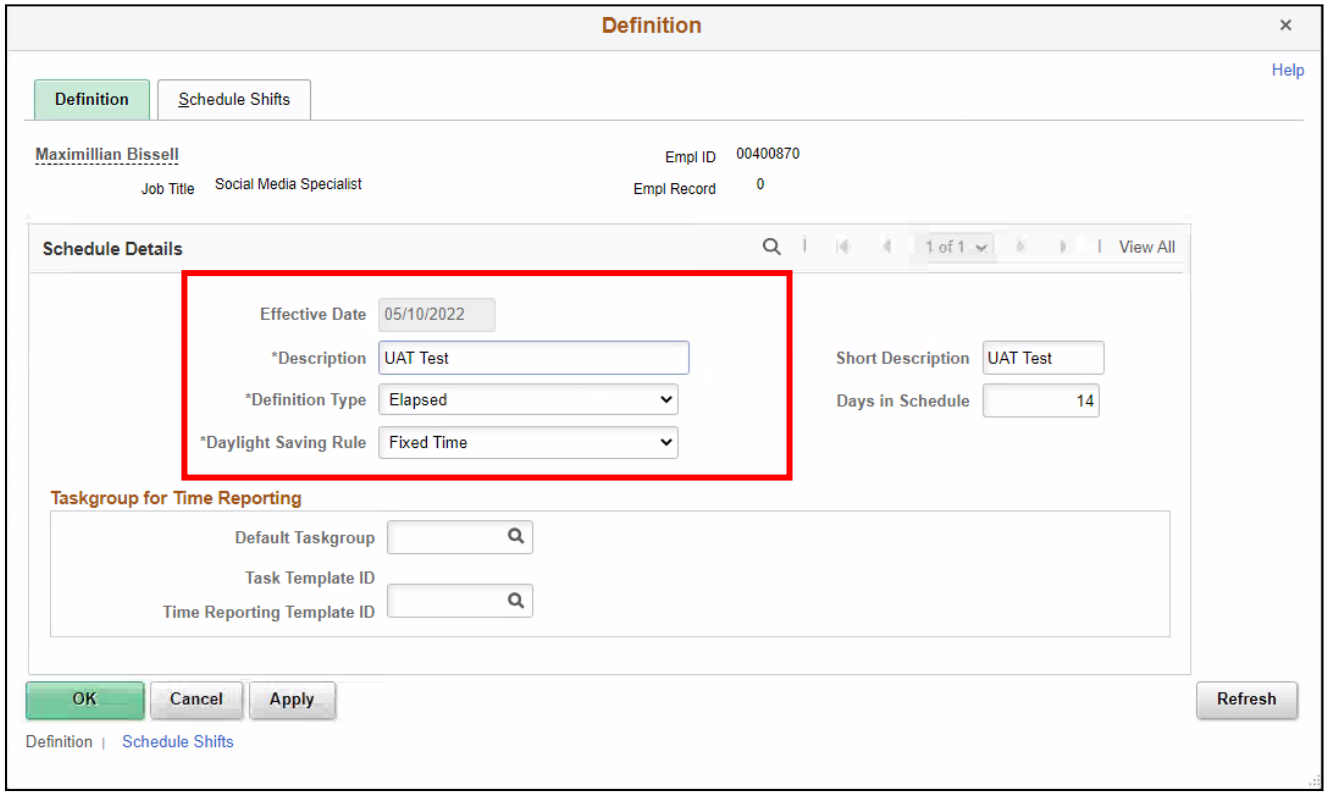
Note: If *Default Schedule* is selected for the **Assignment Method**, INFORMS will use the default schedule from the workgroup assigned to the employee's Time Reporter Data. In the case there is no default schedule set up on the workgroup, INFORMS will use the default schedule from the Paygroup assigned to the employee's job data.

8. Select **Create Schedule.**



Lesson 3: Manage Work Schedule, Continued

9. Here, view and update the schedule details for the employee:

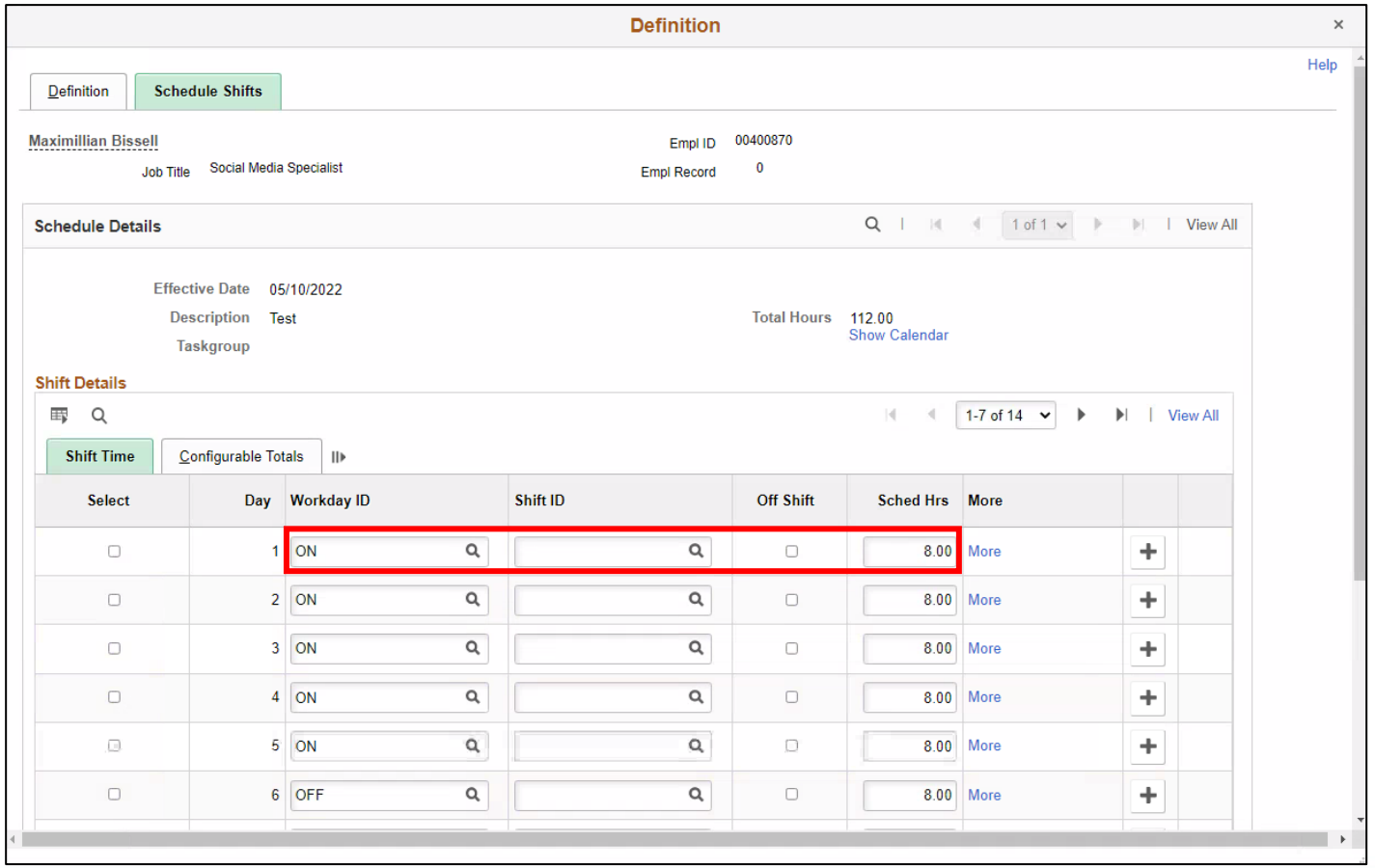


The following are required fields (*) that must be updated prior to selecting **OK**:

- Description
- Definition Type
- Daylight Saving Rule

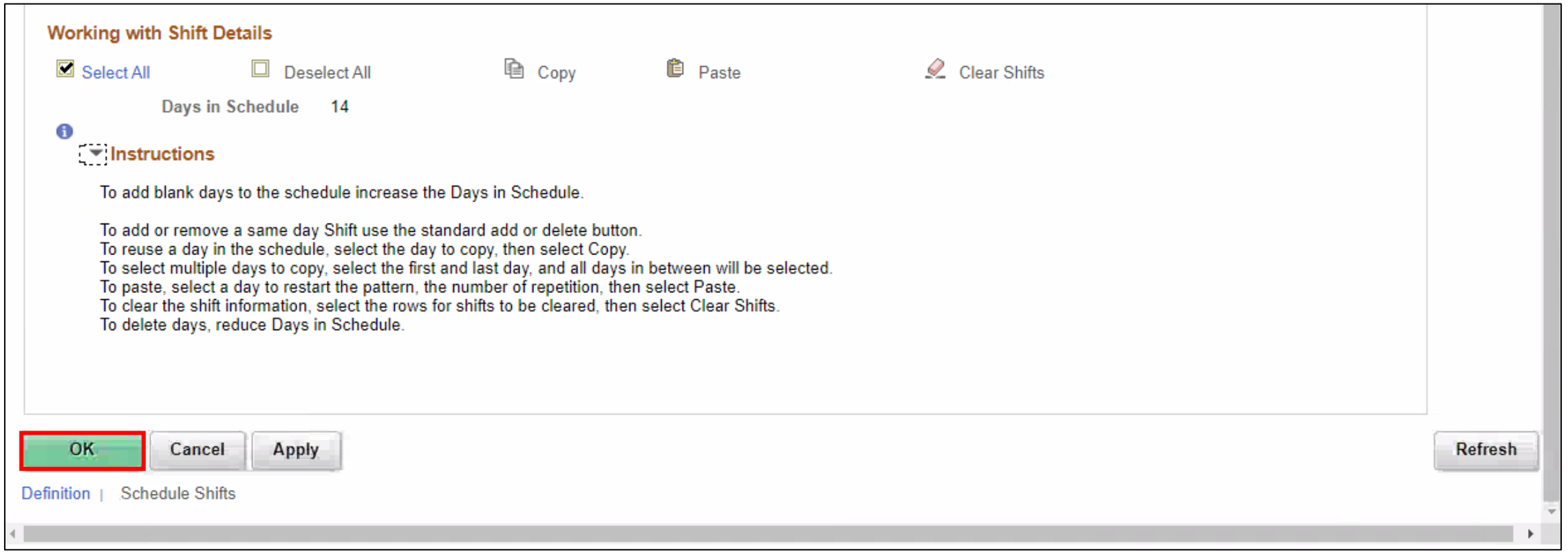
Lesson 3: Manage Work Schedule, Continued

10. Select the **Schedule Shifts** Tab and enter the shift *Workdays, Shift ID, Off Shift* and *Schedule Hrs.*



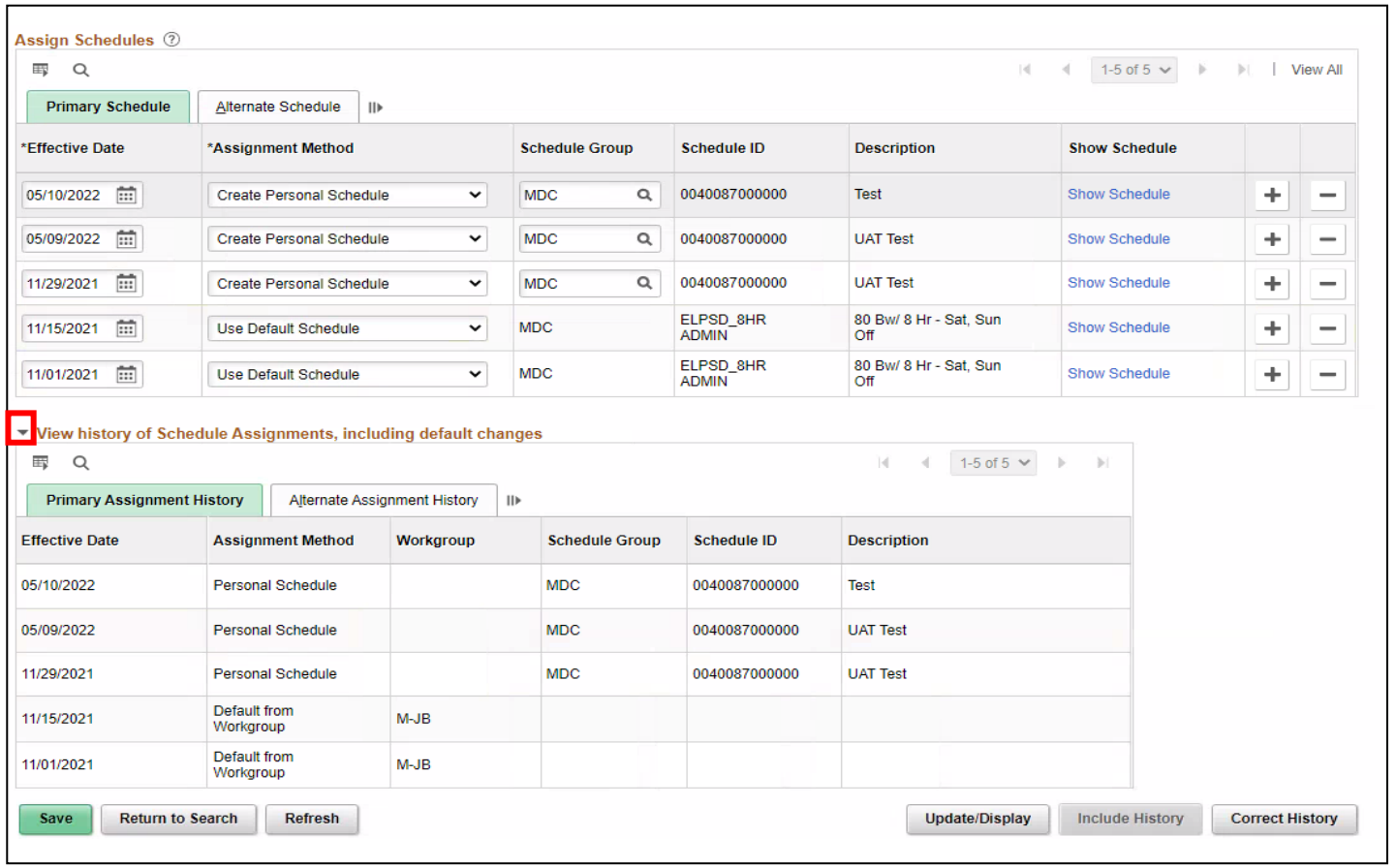
Lesson 3: Manage Work Schedule, Continued

11. Additional instructions are provided at the bottom of this page. Select **OK**.



Lesson 3: Manage Work Schedule, Continued

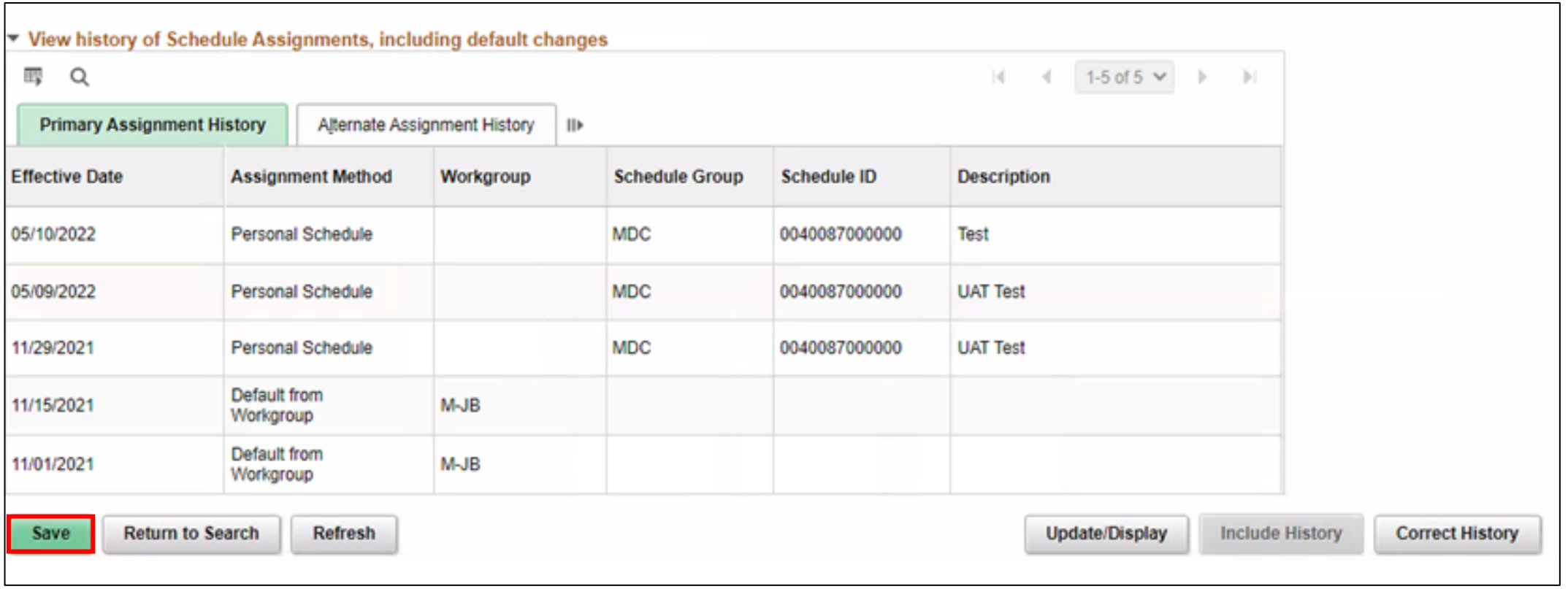
12. On the **Assign Work Schedule** page, select the **grey arrow** next to **View history of Schedule Assignments, including default changes** to review the work schedule history.



Under this section, review the employee's work schedule history, like previous **Effective Date, Assignment Methods, Schedule Groups, Schedule IDs** and **Descriptions.**

Lesson 3: Manage Work Schedule, Continued

13. When all information on the **Assign Work Schedule** page has been entered and reviewed, select **Save.** A Personal Schedule has now been assigned to an employee.

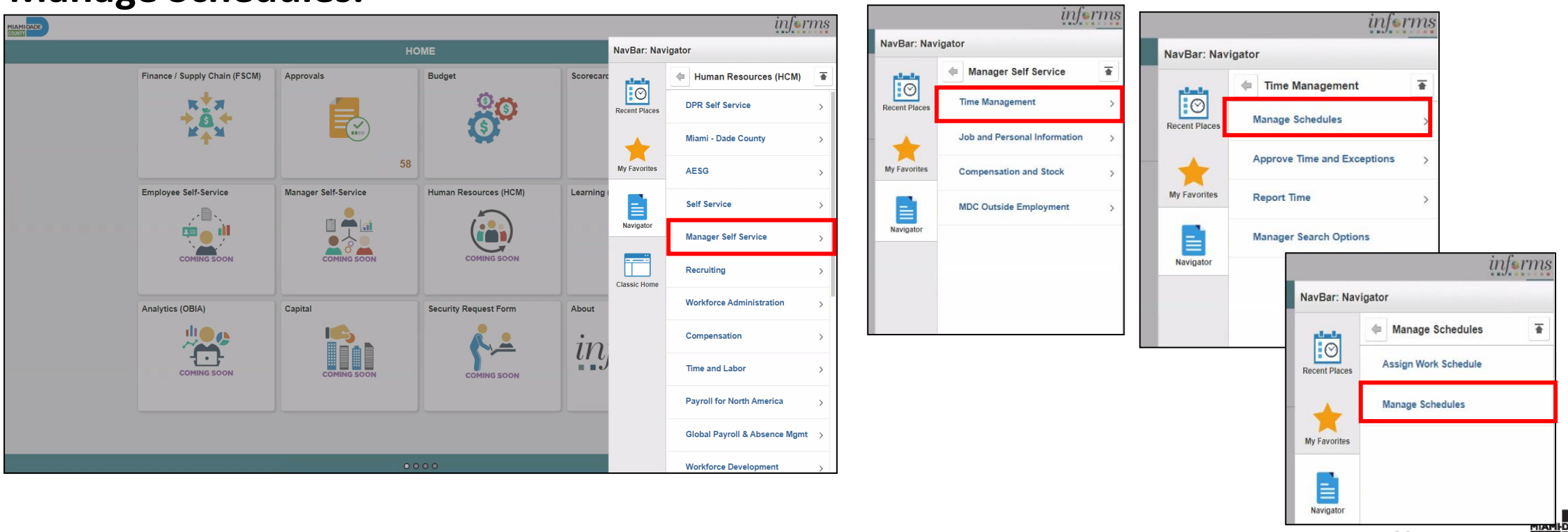


Lesson 3: Manage Work Schedule, Continued

Manage Schedules

Overriding an Employee's Schedule for a Temporary Situation.

1. NavBar Navigation: **Manager Self-Service > Time Management > Manage Schedules > Manage Schedules.**



Lesson 3: Manage Work Schedule, Continued

2. On the **Weekly Schedules** search page, enter any of the following search criteria:

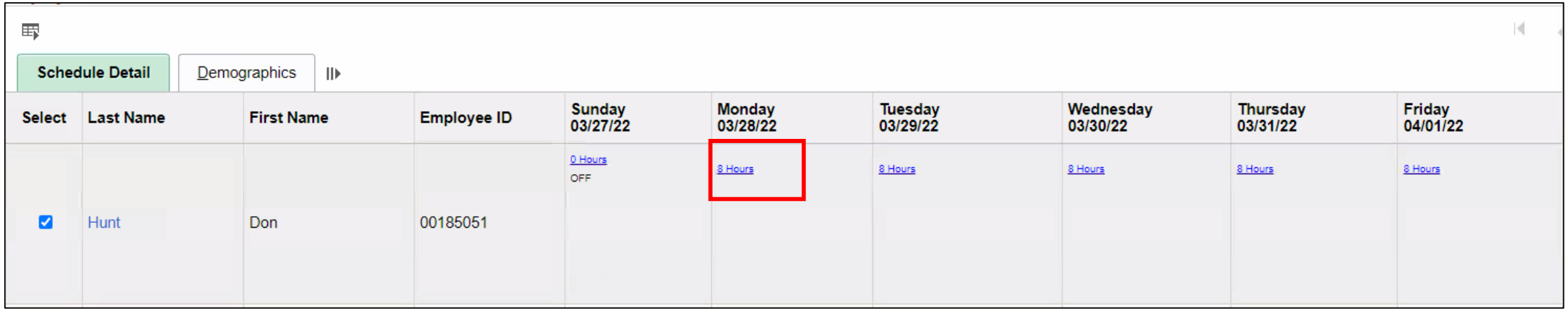
- **Time Reporter Group**
- **Employee ID**
- **Last Name**
- **First Name**
- **Business Unit**
- **Workgroup**
- **Taskgroup**
- **Position Number**

3. When all search criteria are entered, Select **Search.**

Note: If more than one displays in the search results based on your search criteria, select the applicable employee. If there is only one employee that meets the search criteria.

Lesson 3: Manage Work Schedule, Continued

4. Select the scheduled hours for the day the employee's schedule must be overridden. This opens the **Schedule Detail** page.

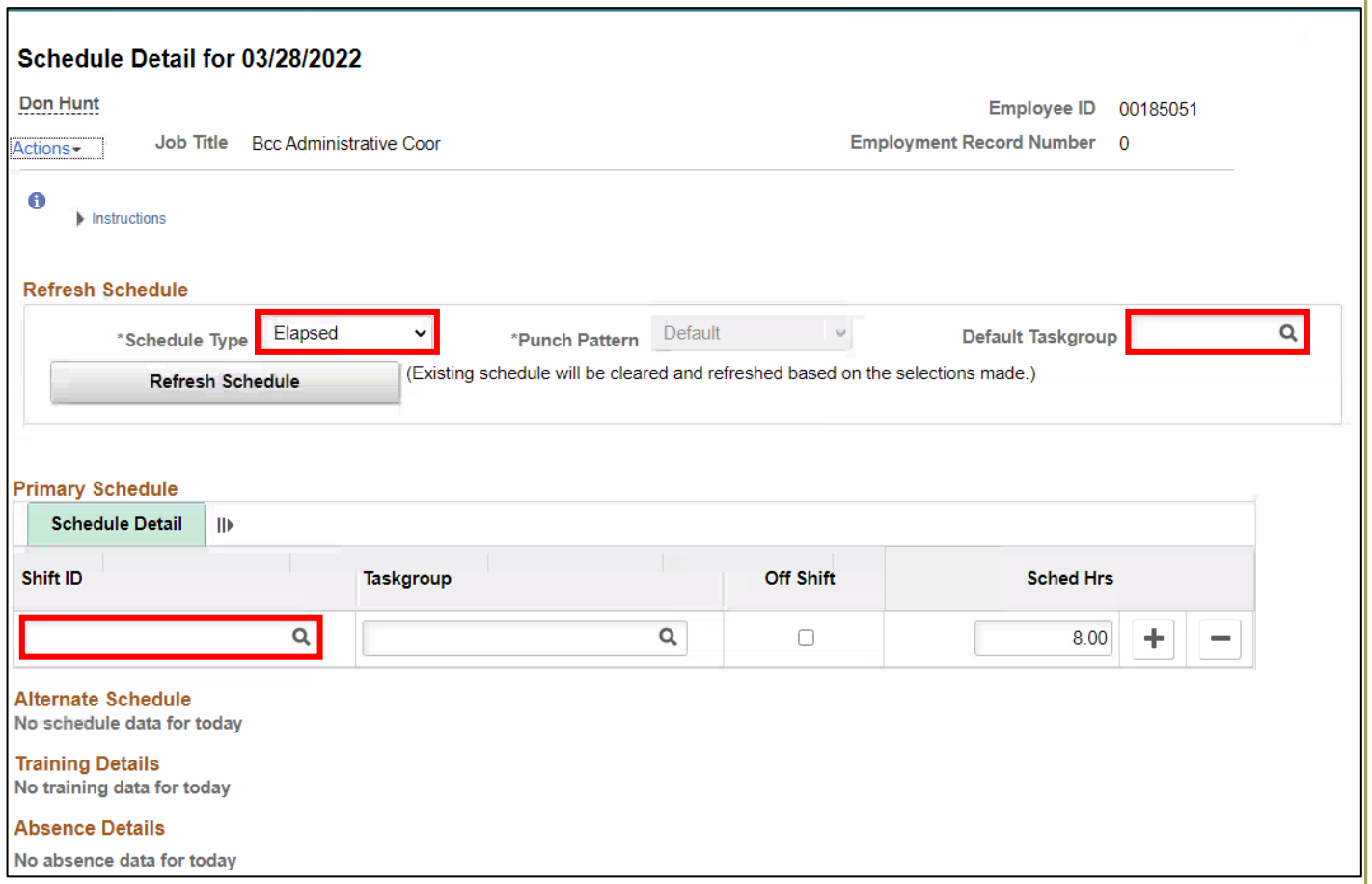


Lesson 3: Manage Work Schedule, Continued

- The Search Results may appear different depending on how the employee reports time. For elapsed employees, schedule hours appear. In addition to the elapsed information, events such as Approved Training, Absence and Holiday information appear in the grid as icons.

Lesson 3: Manage Work Schedule, Continued

- To make a change to the employee's schedule for the day, the manager can add or change the **Shift ID**, or manually enter the new time.
- To clear the schedule, select a **Schedule Type** (if applicable) and enter a **Default Taskgroup.** Then Select **Refresh Schedule.**



Lesson 3: Manage Work Schedule, Continued

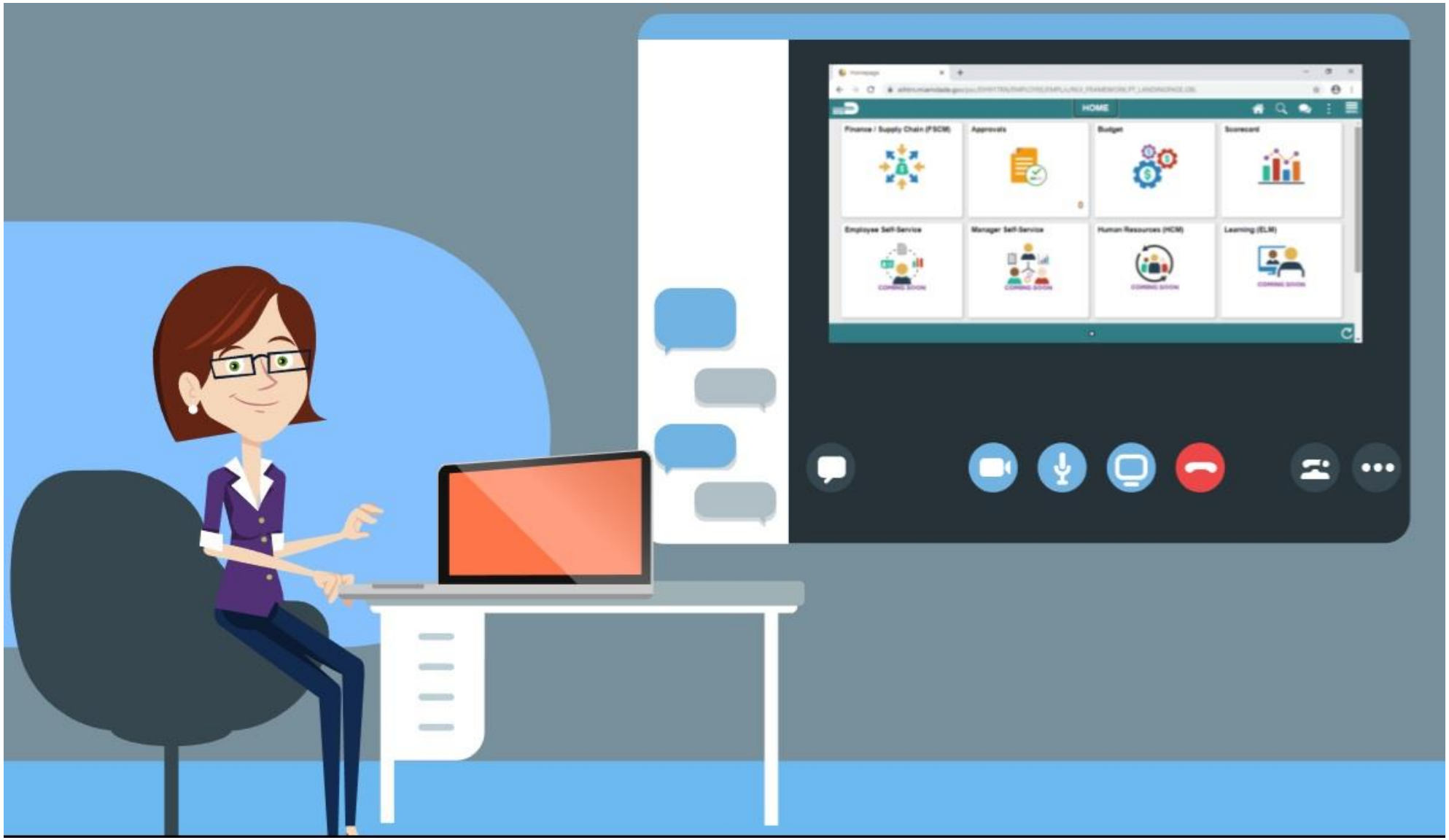
5. On the **Schedule Detail** page, review the Primary Schedule section.

6. Change the **Shift ID** to reflect the new schedule that is going to override what is currently there. Do not override the **taskgroup** for the employee.

7. When all applicable schedule information has been entered, Select **Save.** It is only after the schedules is saved that the information is overridden.

The steps to override an employee's schedules are now complete.

Lesson 3: Activities and Exercises



Lesson 3: Lesson Summary

Now that you have completed the Manage Work Schedule lesson, you should be able to:

- Understand the Elapsed Schedule
- Assign a Personal Schedule
- Manage Schedules

Module 3: Course Summary

Module Topics
Course Content Summary
Additional Training and Job Aids
Course Summary

Course Content Summary

Congratulations! You have completed the Time Management – Timekeeper course.

You now should be able to:

- Enter Time on behalf of an employee
- Submit Absence on behalf of an employee
- Manage Work Schedules

Additional Training and Job Aids

If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits

- Enter Time on Behalf of Employee
- Submit Absence on Behalf of Employee
- Submit Partial Absence on Behalf of Employee
- Manage Work Schedule (Managing Schedules)
- Manage Work Schedule (Assign a Personal Schedule)

For additional information, be sure to visit: www.miamidade.gov/informs

Congratulations on successfully completing the **Time Management** course!

MSS 204 – Manager Self Service – Time Management - Timekeeper